WOMEN'S FOUNDATION OF INDIANA

DONOR-ADVISED FUNDS

A simple, effective approach for personal and corporate philanthropy

YOUR DAF. OUR COLLECTIVE POWER.

Women's Foundation of Indiana is committed to working hand in hand with women, girls and organizations statewide to meet each Indiana community's unique needs, listening closely and collaborating passionately so that every woman and girl has the power, resources and freedom to live life on her own terms. Join us in building collective power for women and girls by opening a charitable fund at Women's Foundation of Indiana.

When you open your donor-advised fund with us, you benefit from a dedicated philanthropic advisor supporting your charitable efforts with personalized service and extensive knowledge around the needs and opportunities in our communities. As a nonprofit ourselves, we are committed to ensuring every dollar has an impact — even the fees assessed to your fund stay here in Indiana and help us strengthen the nonprofit ecosystem.

Tap into our deep community knowledge and relationships with organizations doing the work. We help make your generosity meaningful, personal and impactful.

WHAT IS A DONOR-ADVISED FUND?

A donor-advised fund is a charitable investment account just for you, your family or your company. It's an organized, simple, and cost-effective way to manage, grow, and give away charitable contributions. Offering an immediate tax benefit, the fund is invested to grow over time, allowing you to grant distributions to any qualified 501(c)(3) nonprofit organization. Donor-advised funds are the fastest growing charitable vehicle because they are simple, effective and tax-advantaged.

LOCAL KNOWLEDGE. DEEPER IMPACT.

Our donor-advised funds are provided tailored, hands-on support from a dedicated philanthropic advisor — connecting you to the causes that matter most. Funds receive administrative support, 24/7 online access through our donor portal, tax compliance, grant distribution, and gift recognition processing. Contributions into a donor-advised fund can be made in the form of cash, publicly traded securities, privately held business interests, real estate, and other non-cash assets. You can contribute to your fund at any time, with no minimum requirement, and you can grant distributions from your fund at any time.

WE OFFER TWO PRIMARY TYPES OF DONOR-ADVISED FUNDS:

STANDARD DAF

- No minimum dollar amount required to open (up to $25,000)
- No administrative or investment fees
- 24/7 online account access

ENHANCED DAF

- Established with a minimum of $25,000
- 1% annual administrative fee, assessed 0.25% quarterly, with a minimum annual fee of $250
- 24/7 online account access
- Investment options (long-term growth, balanced pool, cash/money market, or outside investment manager)
- Personal philanthropic advisor as your staff liaison and go-to expert
- Strategic charitable planning services including mission/purpose development, family engagement, youth philanthropic education, facilitation of family meetings, etc.
- Research, impact, and status reports on grantmaking

These services and associated fees apply to our standard fund offerings. Our team can also provide further customized philanthropic advising, fund management and grantmaking services beyond what is outlined here. Please reach out to our staff to discuss additional options.

CORPORATE FUNDS

For businesses, we offer corporate-advised funds, which are identical to a donor-advised fund but specific to the philanthropic needs of a business, as a cost-effective, efficient, and meaningful method of organizing company giving and employee engagement.

- The Enhanced DAF services generally apply
- Administrative fee varies based on engagement level
- Corporate Social Responsibility (CSR) development and implementation
- Philanthropic giving, including employee-matching gift programs
- Employee volunteerism
- C-Suite consulting services, including gift planning and exit strategies

KEY BENEFITS

- Simple and easy vehicle to establish and formalize your charitable giving.
- Manage all or most of your giving from one convenient fund or account.
- Maximum tax benefits and ability to contribute various types of gifts.
- Actively engage in your philanthropy and have access to a philanthropic advisor.
- Learn more about Indiana and nonprofit organizations working to solve community challenges and create thriving, vibrant communities.
- Involve your children or family in your charitable giving, pass the fund on to successive generations and/or develop other legacy goals for your fund.
- Option to involve your financial investment advisor to invest the assets of your fund.
- Fees stay local and are reinvested into the community through our work.

Donor-advised funds offer many of the benefits of a private foundation at a fraction of the cost, with better tax treatment and without the associated legal, tax and regulatory burdens—we assume those for you! Plus, you get the expertise and support of a dedicated philanthropic advisor for a minimal fee. Donor-advised funds can also provide complete anonymity for donors who wish to keep their giving private — as required tax filings for private foundations are public documents.

If you already have a private foundation that's not working for you, we can help convert a private foundation to a donor-advised fund. We can also help you move your donor-advised fund from another provider to Women's Foundation of Indiana. Our staff will work with you and your advisors to complete the paperwork and transfer the assets to your donor-advised fund.

WE'RE HERE TO HELP

Our commitment is to fulfill your philanthropic goals – now and forever. Donor-advised funds are an organized, simple and cost-effective way to manage, grow and give away charitable contributions. We would be honored to help you develop, prioritize and fulfill your charitable goals through a donor-advised fund or other charitable vehicle.

Let us help you formalize your philanthropic impact and change our community — and the world — for the better.