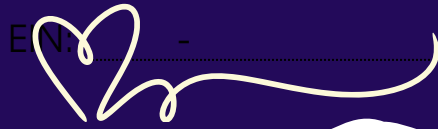


Mapping Out  
Your  
*Give Back* Strategy

Amber Wynn



## What Is a Donor-Advised Fund?

A donor-advised fund is a charitable investment account that lets donors make charitable gifts as frequently as they would like.

These funds are “donor-advised” because, in exchange for the donor’s charitable gift to the sponsoring charity, they can recommend how their funds are invested and which charities will receive payments.

The donor’s contribution comes with immediate tax benefits and is deposited into an account managed by a sponsoring charity so it continues to grow in value. As the fund accrues value, payments are granted out to qualified charitable organizations. Donors are able to make gifts directly to the sponsoring charity that maintains their donor-advised fund account and, in return, receive an immediate charitable deduction for their donations.

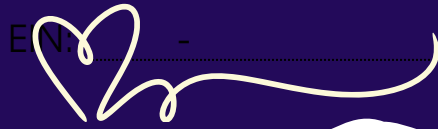
A donor-advised fund is a great solution for anyone who:

- Is subject to paying capital gains taxes on appreciated assets
- Has an estate that is subject to taxes
- Wants an easy way to give to multiple charities
- Wants to involve their family in philanthropy

In general, donor-advised funds are a good fit for individuals, corporations, foundations, and trusts. Donors can recommend that grants be immediately distributed from the account or set-up recurring grants, which is a favorite feature of donors who tithe. Donors who want to involve their family in giving can grant family members advisory privileges. This also fosters a legacy of giving that allows the donor-advised fund to continue beyond the life of the original donor.

- Donors are eligible to receive tax deductions on both donations of cash and appreciable assets.
- Most sponsoring organizations support a range of investment options for the donor-advised fund, offering greater choice and flexibility for tax-free growth.
- Unlike some funds and trusts, there is no startup cost for the donor to establish a donor-advised fund.
- Information on gifts given to donor-advised funds are not publicly available, so donors have the possibility of anonymous gift giving.
- In comparison to other charitable trusts, there are no required distributions, giving donor-advised funds greater flexibility in the types and frequency of disbursements as well as which charities can receive them.





### My business Structure is:

( ) Sole Proprietor      SSN#: ..... - ..... - .....

( ) Limited Liability Company (LLC)      SSN# or EIN: .....

( ) S-Corporation      EIN: ..... - .....

( ) C-Corporation      EIN: ..... - .....

## Step#1 Create a personal charitable mission statement:

When your giving has a clear purpose, it becomes more satisfying, focused and effective. Create a personal charitable mission statement to guide your giving

### What is a charitable mission statement?

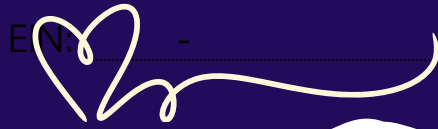
A charitable mission statement is typically one to three sentences that puts the purpose of your giving into words. Your values, life experiences, interests, and close relationships can all play a role in helping you decide what your mission is. A charitable mission statement is designed to crystallize what is most important to you in your giving.

1. It gives your giving focus
2. Putting your mission into words can strengthen your connection to it
3. It helps you decide when to say “No”
4. With your mission statement as your guide, it becomes possible to set actionable goals for what you would like your giving to accomplish over the years

Ultimately, a charitable mission statement is intended to help you make the most of your giving. It's a reflection of your values that can anchor your efforts and keep you on track toward your goals.

When your giving has a clear purpose, it becomes more satisfying, focused and effective. Create a personal charitable mission statement to guide your giving





What inspires you to give? How do you want to make a difference in the world? Answering questions like these is the first step toward writing a charitable mission statement. Doing so can be a powerful way to make your giving more meaningful—both for your personal fulfillment and for the people and communities you're working to support.

### Sample Mission Statements

*"Our primary interest in giving is to ensure that we are taking care of the veterans who have served our country."*

*"Jackson I Pilsner Esq. will help veterans successfully transition out of the military by funding programs that provide job support services."*

### Write Your Mission Statement

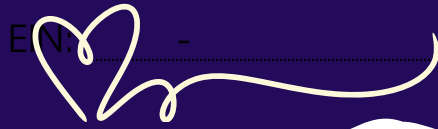
Drawing upon the values, interests, and motivations, write a one-to-three sentence mission statement for your giving.

---

---

---





## Step#2 Name your GiveBack Strategy:

Why do donor-advised funds need names at all? There is a functional purpose, as distinct names help to differentiate DAFs. A good name:

- Ensures clarity regarding the ownership and/or purpose of the fund.
- Is important for record-keeping and administrative purposes.
- Can facilitate compliance with regulations.
- Can provide donors with the opportunity to promote their deeply-held values or honor a cause or a loved one.

Choosing a name for your donor-advised fund brings up questions related to your philanthropic mission and goals and how you would like your generosity to be represented to the nonprofits you support. Would you like the donor-advised fund to bear you or your family's name? Would you prefer to highlight your giving mission or values? And do you have a special purpose for creating the fund, as in a memorial fund for a loved one?

### Mission Related Names

Another popular choice is to name a DAF after a cause that is most important to the donor. In this case the donor should consider whom they wish to help or the goals they'd like to achieve. These names can incorporate positive verbs like "heal," "assist," or "rescue" or nouns like "equity," "sustainability," and "conservation." Example mission-related names can include:

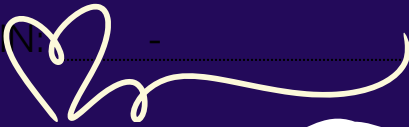
- Urban Health Charitable Assistance Fund
- Homeless Animal Rescue Fund
- At-Risk Youth Philanthropy Account

### Company Names

DAFs can be named after their company. Either the name of the company or a reflection of the type of initiative (CARES, for example). Example of company names can include:

- The Crestfield Company Giving Fund
- Westfield CARES
- Pilsner I Wagoner I Sanchez Charity Fund





## Family Legacy Names

Many DAFs are named after their individual donors (John Smith Fund, for instance), or entire families if multiple family members are involved (the Smith Family Fund). Example family legacy names can include:

- Truman Family Giving Fund
- Heather and Steve Anderson Family Fund
- Sanchez Family Charity Fund

## Memorial and Honorary Names

Some donors choose to name their DAF in honor or memory of someone else to continue that individual's legacy. Example memorial or honorary names can include:

- Uncle Bob's Family Legacy Fund
- Violet Simmons Memorial Giving Account
- The Michael Davis Giving Fund

## Custom and Personalized Names

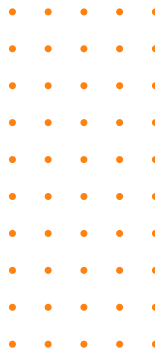
If there's a particular phrase, quote, or saying that is important to the donor and their cause, that can also serve as the DAF's name. A line from a favorite poem, the name of a cherished location or even a verse from holy scripture can all serve as great DAF names. Example personalized names can include:

- Together We Rise Charitable Giving Fund
- Mt. Washington Giving Fund
- The Change We Wish to See Foundation

*Examples of real-world DAF names include:*

- *DAF named after a beloved one: The Matthew Perry Foundation*
- *DAF name that establishes a family legacy: Chan Zuckerberg Initiative Donor-Advised Fund*
- *DAF name that focuses on a mission: Jewish Communal Fund of New York*
- *DAF name that is meant to inspire: Network for Good*





## Let's Name Your Donor Advised Fund!

( ) The ..... Donor Advised Fund

( ) ..... CARES

( ) The ..... Giving Fund

( ) The ..... Charitable Assistance Fund

## List More Names

1. ....

2. ....

3. ....

4. ....

5. ....





With a donor-advised fund, the donor always has the option to donate anonymously. While some donors choose an inconspicuous name for the sake of total anonymity, that may not be necessary. Each time a donor issues a grant to a charity of choice, they have the option to select their desired level of anonymity:

- Print the name of the DAF on the check
- Print their own name and demographic information
- Elect to remain anonymous and print nothing

## Step #3 Determine Funding Amount

☒ ( ) \$ 1,500    ( ) \$ 2,500    ( ) \$ 5,000    ( ) \$ 10,000

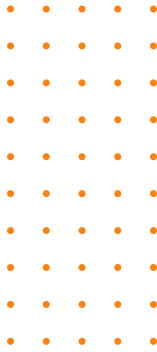
( ) \$ 25,000    ( ) \$ 50,000    ( ) \$ 75,000    ( ) \$150,000

( ) \$250,000    ( ) \$100,000    ( ) \$200,000    ( ) \$250,000

( ) \$ .....







## Step #4 Budgeted Grant Amount:

☒ ( ) \$ 5,000    ( ) \$ 10,000    ( ) \$ 5,000    ( ) \$ 25,000

( ) \$ 50,000    ( ) \$ 75,000    ( ) \$ 100,000    ( ) \$ 150,000

( ) \$ 200,000    ( ) \$ 250,000    ( ) \$ 300,000    ( ) \$ 350,000

( ) \$ .....

## Step #5 Number of Grants Awarded

Number of Grants: .....

## Step #6 Grant Period

Grant Period: ( ) March    ( ) November





## Step#7 Area of Focus:

☒ Please choose the focus area of your project/program:

I want to fund REST (\$10,000) >> ( ) 10 weeks of Vacation

>> ( ) 12 mos of Retirement

( ) Arts and Culture

( ) Education K-12

( ) Education-Higher and Workforce

( ) Housing

( ) Human Services

( ) Animals

( ) Children & Youth

( ) Cultural & Education

( ) Disabilities

( ) Disaster Relief

( ) Elderly

( ) Environment

( ) Global – Locale Based

( ) Health & Disease

( ) Homeless

( ) Hunger & Poverty

( ) International

( ) Military Charities

( ) Racial Equality

( ) Service & Benevolence Clubs

( ) Women's Issues

( ) .....

## Step#8 Geographic Service Area Location(s)

List the geographic area(s) your Fund will cover (City, State, Region):

.....

.....

.....

.....





## Step#9 Applicant Demographics:

Indicate the demographics your grant program was specifically designed to serve: (Check all that apply.)

### Race/Ethnicity

- ☐ American Indian
- ☐ Alaska Native
- ☐ Asian
- ☐ African American/Black
- ☐ Hispanic/Latino
- ☐ Native Hawaiian
- ☐ Pacific Islander
- ☐ Cultural & Education
- ☐ White, non-Hispanic
- ☐ Bi-Racial: .....
- ☐ Other: .....

### Age Group

- ☐ Children - Preschool (0 - 4 yrs)
- ☐ Children - Elementary School (5 - 10 yrs)
- ☐ Youth - Middle School (11 - 13 yrs)
- ☐ Youth - High School (14 - 17 yrs)
- ☐ Young Adult/College (18 - 22 yrs)
- ☐ Adult (23 - 59 yrs)
- ☐ Senior (60+ yrs)
- ☐ Not Age Specific
- ☐ Other: .....

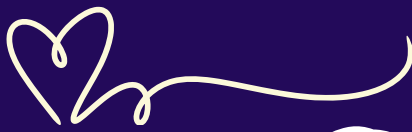
### Additional Populations

- ☐ Members of LGBTQ+ or allies
- ☐ Immigrants
- ☐ Veterans
- ☐ Residents with disabilities
- ☐ Other: .....
- ☐ N/A: .....

### Gender

- ☐ Female
- ☐ Male
- ☐ Non-Binary
- ☐ Transgender
- ☐ Agender
- ☐ Gender Fluid





## Contact Information

First Name: ..... Last Name: .....

Address: .....

City: ..... State: ..... Zip: .....

Website: ..... Email: ..... Telephone: ( ) - .....

Name of Business: .....





[www.thegivebackstrategy.org](http://www.thegivebackstrategy.org)