Why consider a Donor Advised Fund instead of a Private Foundation?

We know you have choices to achieve your family's charitable goals. Are you wondering if a donor advised fund (DAF) is right for your charitable giving needs? Are you considering starting a private or family foundation? Here are some things to know about each option.

<table>
<thead>
<tr>
<th>Administrative Requirements</th>
<th>Donor Advised Fund with the Catholic Foundation</th>
<th>Private or Family Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A simple agreement establishes a fund with the name of your choosing. We manage investing, accounting, and state &amp; federal reporting.</td>
<td>An individual 501(c)3 organization must be established and will require filing with the IRS for charitable tax exemption status. Responsible for compliance with state &amp; federal guidelines.</td>
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<tr>
<td>Costs</td>
<td>No start-up costs; administrative fees of $100 annually and 0.25% quarterly of the fund balance.</td>
<td>Requires engaging lawyers, accountants, and staff, as well as other administrative and filing expenses.</td>
</tr>
<tr>
<td>Support and Grantmaking Guidance</td>
<td>At the Catholic Foundation, we do the research for you to ensure your grant recommendations go to qualified charities in alignment with our Catholic values.</td>
<td>Little assistance available.</td>
</tr>
<tr>
<td>Distribution Requirements</td>
<td>Active grantmaking is encouraged from our fund advisors. We ask a minimum of one grant recommendation be made per year.</td>
<td>IRS requires at least 5% distribution annually for charitable purposes based on asset value.</td>
</tr>
<tr>
<td>Annual Tax Filing and Return</td>
<td>No filing required. The Catholic Foundation handles it for all our funds.</td>
<td>Must be filed with required reporting schedules.</td>
</tr>
<tr>
<td>Investments</td>
<td>Fund assets are professionally invested in a socially-responsible portfolio that aligns with Catholic values.</td>
<td>Must research, secure, and monitor its own investment vehicles.</td>
</tr>
<tr>
<td>Privacy</td>
<td>With each grant recommendation, you choose how you'd like to be acknowledged. Share the fund name, your name, or give with complete anonymity.</td>
<td>No anonymity option.</td>
</tr>
</tbody>
</table>

**LEARN MORE BY CONTACTING THE CATHOLIC FOUNDATION TODAY.**

360 DIVISION AVE. S. | GRAND RAPIDS, MI 49503 | 616.333.1640 | catholicfoundationwmi.org