

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.

	Donor Advised Fund with the Catholic Foundation	Private or Family Foundation
Administrative Requirements	A simple agreement establishes a fund with the name of your choosing. We manage investing, accounting, and state & federal reporting.	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 & federal guidelines.
Costs	No start-up costs; administrative fees of \$100 annually and 0.25% quarterly of the fund balance.	Requires engaging lawyers, accountants, and staff, as well as other administrative and filing expenses.
Support and Grantmaking Guidance	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.	Little assistance available.
Distribution Requirements	Active grantmaking is encouraged from our fund advisors. We ask a minimum of one grant recommendation be made per year.	IRS requires at least 5% distribution annually for charitable purposes based on asset value.
Annual Tax Filing and Return	No filing required. The Catholic Foundation handles it for all our funds.	Must be filed with required reporting schedules.
Investments	Fund assets are professionally invested in a socially-responsible portfolio that aligns with Catholic values.	Must research, secure, and monitor its own investment vehicles.
Privacy	With each grant recommendation, you choose how you'd like to be acknowledged. Share the fund name, your name, or give with complete anonymity.	No anonymity option.

LEARN MORE BY CONTACTING THE CATHOLIC FOUNDATION TODAY.