



THE GREATER  
CINCINNATI  
FOUNDATION



## A Personal Approach to Giving

### DONOR ADVISED FUNDS

When you make a charitable gift, you want to be highly involved in where the money goes. You also want the flexibility to support different charities at different times. If these are important issues for you, a donor advised fund from The Greater Cincinnati Foundation (GCF) can be the solution.

Donor advised funds are a convenient, versatile tool that many individuals and organizations use to effectively plan and manage charitable gifts. It's a great choice if you have a broad range of community interests in the Greater Cincinnati region, or other areas close to your heart.

#### Flexibility and opportunities

When you establish a donor advised fund at GCF, you can:

- Support your charities of choice throughout the country. Contribute to a local charity that you have volunteered for or that has helped someone you know. Give to your local church or synagogue. Suggest a grant to an alma mater anywhere in the nation. Any public charity in the U.S. can receive grants from a GCF donor advised fund.
- Suggest multi-year grants that pay out on a regular schedule – or plan your grants to help charities when they need it most. You suggest the timing; GCF will manage the details.
- Give to annual campaigns such as the United Way and Fine Arts Fund. Many people do most or all of their annual giving through their GCF donor advised fund.
- Donate stock, real estate, or partnership interests, as well as cash. Your investment portfolio is unique; therefore your giving options should allow maximum flexibility. GCF is equipped to handle gifts of closely held and publicly traded stock, as well as limited partnership interests.

Involve your children or grandchildren – and potentially generations to come. A GCF donor advised fund can become a family affair involving multiple generations of advisors. Larger funds may be endowed for future generations to carry on. You can use a bequest or a gift to increase the impact, ensuring a lasting legacy and passing along charitable family values.

Safely access fund information and make grant suggestions online to make your contributions efficient, quick and “green.” We also accept suggestions by fax or U.S. Mail.



### How your fund works

Once you have decided to establish a donor advised fund, GCF works step-by-step with you to create and manage it.

1. You make your gift to GCF of cash, appreciated stocks, real estate, or other assets.
2. You select the investment manager from GCF’s list of authorized partners.
3. GCF creates the fund in your name, your family’s name, or the name of any individual or organization you choose.
4. You receive tax benefits in the year(s) your gift is made.
5. You recommend uses for the fund, working with our professional staff to support the causes and organizations you care about most.
6. Your recommendations are presented to GCF’s Governing Board for approval. {For legal purposes, grants must be ratified by GCF to ensure compliance with regulations governing valid U.S. nonprofit organizations.}
7. The GCF board issues grants to the designated nonprofit organization from your fund.
8. GCF handles all administrative details, including the specific purposes that you may establish for grant disbursements. Because GCF manages the process, the grant recipients can remain focused on their missions. For these services, we assess fees at levels comparable with commercial financial institutions.
9. You will receive regular communication from GCF with updates on the impact of your gift.

You can establish a fund today and make grant recommendations now or in the future. GCF can facilitate even the most complex forms of giving, such as closely held stock, trusts or real estate.

You can time your gifts to fit your personal tax situation. Contributions can be made at any time and are tax-deductible in the year you make your gift. You can also request a grant check to be issued whenever your favorite charities need the support.

### GCF SUPPORT

When you set up a donor advised fund at GCF, you will have access to the experience and expertise of our dedicated staff. You will receive personal attention from a professional who cares about you and your charitable goals. In addition to fund and investment information, our staff can answer questions about how to make smart and meaningful investments in our local community.

For nearly 50 years, GCF has been helping people achieve their charitable goals, supporting nonprofit organizations, and creating lasting good work in the region. We provide a simple, powerful, and highly personal approach to giving and offer a variety of tools to meet specific individual needs.

*For more information, ideas, and details about options for charitable giving, ask your professional advisor or contact GCF:*

Phone: 513-241-2880  
E-mail: [info@gcfdn.org](mailto:info@gcfdn.org)  
Web site: [www.gcfdn.org](http://www.gcfdn.org)



THE GREATER  
CINCINNATI  
FOUNDATION

WE HELP PEOPLE MAKE THE  
MOST OF THEIR GIVING TO BUILD  
A BETTER COMMUNITY.