



Your Trusted Philanthropic Partner

Purpose-Driven Philanthropy

As a trusted and connected partner, Greater Cincinnati Foundation (GCF) inspires generous people to invest in a more equitable and vibrant Greater Cincinnati, now and for generations to come. At GCF, we connect people with purpose because the greatest changes happen when people come together in partnership, collaboration and generosity.

The GCF Difference

IMPACT

- Connecting donors to the local nonprofit community
- Convening cross-sector partnerships to solve community-wide issues
- Marshalling resources with donors for maximum impact
- Addressing urgent local, national and international needs

SERVICE

- Dedicated personal philanthropic advisors and custom charitable solutions
- Multi-generation family philanthropic solutions for a lasting legacy
- Community knowledge to understand the region's greatest needs and connect donors as needs align with their interests
- Connection with other charitable-minded individuals and the opportunity to learn together about local issues

FLEXIBILITY

- More tax-wise tools and solutions than other charitable funds
- Robust succession planning
- Funds can be actively managed by a donor's investment manager
- Flexible grant-making strategy

WHY A DONOR ADVISED FUND





A donor advised fund (DAF) is a smart charitable tool that maximizes tax savings and creates impact in your community. You are enabled to:

- **Streamline your charitable donations** in one place including tax receipts and giving history
- **Donate privately held business assets** like stock, private business or real estate to erase the capital gains and receive the charitable deduction for the current fair market value
- **Grow your giving** by investing your fund's balance*
- **Bunch your giving** for a tax-wise strategy: use standard tax deduction in some years and itemize deductions in other years
- **Maintain privacy and anonymity**
- **Organize your giving** and even include family members in the process
- **Create a charitable legacy** using a DAF as the vehicle
- **Leverage a DAF as a giving tool** in conjunction with your private foundation

*Investing involves risk and the balance may gain or lose value as a result.

The GCF Advantage

A donor advised fund at GCF is more than just a charitable checking account. Our end-to-end service delivers unmatched value from maximizing impact to creating a lasting legacy.

	 Vanguard Charitable SCHWAB CHARITABLE FIDELITY Charitable*	 American Endowment Foundation	 National Philanthropic Trust	 GREATER CINCINNATI FDN.
	.60%	.70%	.78%	1%*
Geographic Impact: Donor can make grants locally, nationally and internationally	✓	✓	✓	✓
Charitable Planning: Easy succession planning to involve multi-generations for a lasting legacy				✓
Co-investing: Grant alongside GCF to support transformative change and collaborate with like-minded individuals for high-impact grants through collective giving or giving circles				✓
Local expertise, global impact: Leverage GCF's deep community knowledge and philanthropic expertise for wide impact through its regional, national and global footprint				✓
Personalized client care: Dedicated personal philanthropic advisors with donor relationship and trust at the center				✓
Multiple tools and flexible solutions: Best practices in philanthropy combining industry expertise, multiple tools and flexible short- and long-term solutions				✓
Cross-sector knowledge and partnerships: Connect donors with community partners and marshal resources to solve urgent needs				✓
Charitable impact with quick response: GCF fees create charitable impact and quick response to local urgent needs.				✓

*1% average. Varies by fund size.



"My wife and I make grants to our favorite nonprofits locally and nationally from our donor advised fund at GCF. The bonus is that the fund's fees support all the great work GCF is doing in our community. It's a win-win that makes us feel twice as good about our charitable giving!" –Dave Foster



Set up a complimentary consultation with GCF today:
Michele Carey, CAP, Director, Professional Advisor Relations
513-768-6171 or michele.carey@gcfdn.org

LEVERAGE GCF'S END-TO-END PHILANTHROPIC SERVICES

STEP 1:

1:1 welcome meeting with a philanthropic advisor. Share your vision through philanthropy.

STEP 2:

Support your favorite organizations via GCF's online giving platform.

STEP 3:

Receive ongoing services from GCF.

Create a strategic philanthropic plan focused on passion areas, loyalty and reactive giving.

Collaborate with GCF and other professional advisors for a holistic giving strategy.

Learn about needs in the community through GCF staff, events and webinars.

Participate in a giving circle with other GCF donors around a shared interest area or affinity.

Engage in family philanthropy workshops to involve the next generation of donors.

Diversify your charitable portfolio through one of our impact investments.

Respond to an urgent need in the community through a crisis campaign.

Co-invest alongside GCF in one of our grant cycles.



STEP 4:

Create an impactful legacy - After your lifetime, GCF can steward your charitable legacy according to your wishes to include family involvement, supporting your most beloved organizations, or addressing the community needs that you care about most.



GREATER
CINCINNATI
FDN.

Get an expert consultation with GCF's Chief Philanthropy Officer today!
Phillip Lanham, CAP / Phone: [513-768-6155](tel:513-768-6155)