

DONOR ADVISED FUND

The most flexible way to achieve your philanthropic goals. This fund is designed for donors who prefer to be actively involved in directing how the funds are used, and who wish to request grants be made to specific organizations as charitable needs arise.

BENEFITS AND SERVICES:

1. Highly personalized and flexible service tailored to your charitable and financial interests.
2. Knowledgeable staff with in-depth grantmaking and giving expertise.
3. An easy and secure online portal so you can view your fund balance 24/7.
4. Grants administration and processing by LBCF allows for easy and hassle-free grant making.
5. Tax benefit is realized by the donor immediately after a contribution is made.
6. An array of investment options that are carefully selected and managed as part of a \$3 billion portfolio, bringing you economies of scale investment results.
7. Protective oversight of your fund provided by LBCF on a local and national level.
8. An option to have your financial advisor manage the fund assets.
9. Invitations to exclusive Community Foundation events with other donors and local nonprofit grantees.
10. Quarterly statements show all investment, donation and grant activity.



11. Comparable rates and fees to other community foundations.
12. Double your impact: the fees charged support philanthropic grants and programs in the Long Beach community.
13. Available option to raise funds through the LBCF website.

ADVANTAGES OF OPENING A FUND INCLUDE:

1. No legal liability. The Community Foundation remains in full compliance with state and federal regulations as they relate to grants and contributions.
2. Name your fund and issue grants in your name or anonymously.
3. Simple alternative to a Private Foundation with the same benefits and without the hassle and costly legal fees.
4. Be actively involved in directing how the funds are used.
5. Request grants be made to specific organization as charitable needs arise or select an advisory committee (such a family or friends) to choose grant recipients.
6. LBCF makes a conscious effort to work with Long Beach based organizations.