

# DONOR-ADVISED FUNDS AT COMMUNITY FIRST FOUNDATION



## Your vision. Our support.

### Give smarter with a donor-advised fund

A donor-advised fund is a charitable giving fund that allows individuals, families and businesses to support favorite charities over time, yet receive an immediate tax benefit. When you create a donor-advised fund at Community First Foundation, your vision is combined with our personal service and in-depth understanding of charitable giving opportunities.

# How a donor-advised fund works

## In five easy steps



**1. Review & Complete** the Donor-Advised Fund Gift Application, Guidelines and Fund Agreement.



**2. Donate** cash, marketable securities, real estate or complex assets to Community First Foundation.



**3. Receive** a single tax receipt and charitable deduction in the same year as your gift.



**4. Give** from your fund at your convenience.



**5. Build** your fund by making additional contributions and let it grow as part of the Foundation's investment pool.

## Convenient, organized and effective giving

When you establish a donor-advised fund with Community First Foundation, supporting your favorite charities is simple and easy.

- When you want to give from your fund, you make a grant recommendation to Community First Foundation.
- The Foundation processes grant recommendations weekly.
- Grant checks are sent with a cover letter stating the purpose of the gift and the name of your fund.

"My entire estate will go to my donor-advised fund at Community First Foundation to continue a culture of philanthropy in coming generations."

*Sandy Vanderstoep*



"A donor-advised fund is an excellent vehicle for giving as a family. We're encouraging our children to discover areas of need they're most passionate about."

*Julie and Jonathan McVey*

"I thought that donor-advised funds were only for the very wealthy. Then I learned that all levels of donors can benefit from the tax advantages."

*Lynne Valencia*



## Low minimum, low fees

We keep our minimums and fees low to encourage charitable giving.

### Minimum donation

\$5,000 to open a fund

### Annual administrative fees

\$200 minimum or:

- 1.00% on first \$1,000,000
- 0.75% on second \$1,000,000
- 0.50% on balances above \$2,000,000



"By opening a donor-advised fund at Community First Foundation we've been able to simplify our giving and be more strategic in our support of charities."

*Christopher and James  
Davis-Massey*

## The value of Community First Foundation

**Individual giving.** Whether you donate a windfall, a bonus or funds set aside for charitable giving, a donor-advised fund is a convenient, flexible and efficient way to make tax-advantaged gifts to your favorite charities.

**Access to local nonprofits.** Our extensive relationships with local nonprofits help you make meaningful connections and arrange site visits with charitable organizations.

**Expert oversight.** Managed by our finance team, board of directors and an independent investment consulting firm, your fund is in expert hands.

**Family philanthropy.** We can help introduce your children and grandchildren to the joys of giving and support a culture of giving for future generations.

**Business philanthropy.** As a business owner, you can create a fund to support the community and the charitable activities that are meaningful to you and your organization.

**24/7 access.** Through Community First Foundation's online portal, you can check your fund balance and make grant recommendations 24 hours a day, seven days a week.

**Online giving.** Make grant recommendations online from your donor-advised fund to your favorite Colorado nonprofits on Colorado Gives Day, the state's largest giving day.

POWERING

COMMUNITY

TOGETHER

"Community First Foundation has excellent knowledge of Colorado's community needs. This is why we've entrusted them with the stewardship of a \$13 million donor-advised fund to ensure Coloradans receive blood services for years to come."

Anne Burtchaell, Bonfils Blood Center



Lab technician at Bonfils Blood Center

## About Community First Foundation

Since 1975, Community First Foundation has helped individuals, families, businesses and nonprofits come together to improve the quality of life and create positive change in Jefferson County, the Denver metropolitan area and beyond.

Signature programs include ColoradoGives and Colorado Gives Day, The Innovators Society and Kids for ColoradoGives.



## Our Mission

Community First Foundation increases generosity and powers community for positive change.

## Our Values

Innovation. Integrity. Service. Stewardship. These values represent our dedication to being a force for good.

## Learn More

[philanthropy@CommunityFirstFoundation.org](mailto:philanthropy@CommunityFirstFoundation.org)  
720.898.5900



5855 Wadsworth Bypass, Unit A | Arvada, CO 80003

p: 720.898.5900 | f: 720.898.5901 | [CommunityFirstFoundation.org](http://CommunityFirstFoundation.org)