



Charitable Fund Partners Program

The Charitable Fund Partners Program is collaboration between financial advisors and the Delaware Community Foundation that gives you the opportunity to establish a charitable fund under the management of your financial advisor. A DCF charitable fund offers a flexible way to achieve your charitable goals while you earn a federal income tax deduction in the year of the donation. You can establish a fund to support the causes most important to you.

What are the benefits of a charitable fund with the DCF?

Make charitable gifts with ease

You create a charitable legacy with a DCF fund. The Foundation offers you and your financial advisor local expertise, personalized service and community leadership. You can take advantage of the ability to benefit multiple charities of your choice and to make gifts anonymously.

Benefit from professional services

The Delaware Community Foundation frees you from the day-to-day administrative responsibilities of managing philanthropic gifts. Our staff provides grantmaking expertise and other support services to help maximize the impact of your charitable gifts and develop your strategy for philanthropy over time. Your advisor has professional investment managers available to help build charitable assets over the life of your fund.

How can you get started?

To establish your charitable fund, you sign an agreement with the Delaware Community Foundation. Your financial advisor is not party to this agreement. The minimum amount to start a charitable fund in the Charitable Fund Partners Program is \$100,000. Additional funds can be contributed at anytime in any amount. If you are seeking a versatile, convenient tax management and philanthropic planning tool, ask your financial advisor about the DCF Charitable Fund Partners Program.

Note:

The financial advisor firm and the Delaware Community Foundation are separate entities and are not affiliates. A fund established through the Charitable Fund Partners Program will pay an administrative fee to the DCF according to the schedule in this publication and an investment management fee to the financial advisory firm in accordance with the published fee schedule. Your financial advisor will receive a portion of this fee. All charitable gifts are irrevocable. After the gift is made, the assets belong to the DCF. The DCF does not provide legal or tax advice. You should discuss potential tax benefits with your tax advisor.

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Confirmed in Compliance with
National Standards for U.S.
Community Foundations