



## Donor Advised Fund Jumpstart Guidelines

- It is recommended that Donor Advised Accounts be opened with a minimum of \$10,000.00. Funds opened with \$100,000 which will maintain a minimum of \$50,000 are eligible to be invested.
- Funding is accepted by check, wire transfer and marketable securities (please contact the Foundation office for security transfer instructions). More complicated donations will be considered by the Board of Directors on a case by case basis. Contributions qualify for tax deduction in the year given, while your grants can be made at any time.
- Donors may appoint a Successor or Successors to designate gifts from the account.
- Gifts must be designated for any IRS qualified charity, a specific purpose or allocation can be included in the transmittal letter.
- Gifts may not be used for any private benefit, such as school tuition, dues or memberships, benefit tickets, fundraising dinners, your time or services, gifts to individuals, goods bought at auction or to fulfill pledges.
- Donor Advised Gift Forms can be obtained from the Foundation office or downloaded from the website or emailed on request. We also now accept requests in the body of an email. You will be notified by mail when funds have been approved and distributed.
- Minimum Account Balance \$1,000 (minimum balance for invested funds is \$50,000).