

DONOR ADVISED FUNDS



Establish a Donor Advised Fund at Austin Community Foundation and join hundreds of individuals and families benefitting from our exemplary service, local expertise and efficient resources to simplify your giving and maximize your impact.

Benefits and Services

- Immediate charitable deduction for your gift (amount allowable by law)
- Ability to consolidate all your charitable giving
- Ability to accept complex gifts - cash, appreciated stock, privately held stock, business interest, real estate, and other assets.
- Option to invest in market or not
- Invested funds may be permanent (endowed) or 100% available (quasi-endowed)
- Give locally, to any nonprofit in the U.S. and abroad (some limitations apply to international grants)
- Pass-through giving to nonprofits (ex: complicated asset or desire for confidentiality)
- Easy and secure access to fund 24/7 through online donor portal
- Make grants online any time
- Ability to review and fund requests made through Foundation's Community Grants program
- Invitations to exclusive fundholder events and networking opportunities

You may open a donor advised fund with a gift of cash, appreciated stock, mutual fund shares, closely held stock, real estate, retirement account, life insurance or a bequest or another deferred gift.

Type of Fund	Endowed & Quasi-Endowed Funds	Non-Endowed Funds
Fund fee	Tiered Fees: Below \$1,000,000 – 1.0% Assets \$1,000,000+ - 0.75% \$3,000,000+ - 0.50% Fees are assessed at the rate of 1/12th of the fee on the average balance of fund each month.	Below \$1,000,000 – 1.50% Deposits Above \$1,000,000 – 1.00% Annual fee: \$100 Fees are assessed on deposits monthly.
Additional fees	Investment expenses average 0.25-0.8% depending on investment option. Fee includes investment counsel.	
Fund minimum	\$5,000	No minimum

Additional fees apply for gifts made with credit card.

The spending policy for endowed funds provides for a maximum available for granting and is calculated as 4% of the average trailing 20 quarters of the fund's market value.