

DONOR ADVISED FUND

A Donor Advised Fund provides a flexible, and tax-efficient way to streamline your charitable giving. You establish the fund by making a gift and then remain actively involved in suggesting grants from your fund to the nonprofit organizations you wish to support. Their ease of use and potential tax advantages make Donor Advised Funds the fastest-growing charitable giving vehicle in the nation.

HOW IT WORKS



GIVE



GROW



GRANT

- Make a minimum gift of \$10,000 to establish a non-endowed fund or a gift of \$100,000 to establish an endowed fund.
- Gifts can be in cash, appreciated stocks, real estate, or other assets.
- We set up a fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You recommend grants from the fund to your favorite nonprofit organizations to support the causes you care about.
- You may receive tax benefits in the year your gift is made.
- Our professional staff ensures the nonprofits you wish to support are in good standing.

WHAT SETS THE COMMUNITY FOUNDATION APART?

There are other entities you could partner with to open a donor advised fund, but if you want to make a difference in Marathon County, you will have to know what needs are most pressing. As a funding source for local nonprofits, we stay updated on the list of ever-changing needs, projects, and capital campaigns. This community knowledge sets us apart. **We will help keep you updated on the causes you care about.**

By establishing a donor advised fund, you can also create a family legacy of philanthropy by engaging the next generation in making grant recommendations. If you choose to **pass along your fund to the next generation**, we will help facilitate the transition, ensuring your generosity will continue to impact our community.

A PERSONAL APPROACH

Founders of Wausau Coated Products, Inc., Bill and Mary Nell Reif, not only give back to the community themselves but formed the Wausau Coated Products Inc. Fund in 2010 to foster and encourage philanthropy among the company's employees through payroll deductions. The program includes a dollar-for-dollar match as an added incentive and a committee that holds fundraisers throughout the year to benefit the fund. Bill and Mary Nell accomplish their personal philanthropy through the William M. & Mary Nell Reif Family Fund. Their fund allows the couple to be involved with, and remembered for, their community investment.



"Establishing a fund with the Community Foundation is a simple, powerful, and highly personal approach to giving and a great way to always be involved with, and remembered for, your community investment. When you give, you get so much more in return."

-Bill & Mary Nell Reif

