

WHAT IS A DONOR-ADVISED FUND (DAF)?

A donor-advised fund (DAF) is a flexible, tax-efficient way to manage your charitable giving. It works like a charitable investment account—you contribute cash, stocks, or other assets, receive an immediate tax deduction, and recommend grants to the nonprofits you care about. Your contributions grow tax-free, allowing you to give more over time.

WHY CHOOSE A DONOR-ADVISED FUND?

- ✓ The most popular tax-efficient way to give
- ✓ A tax-smart way to manage philanthropy
- ✓ Maximize impact while simplifying your giving

At Pinellas Community Foundation,
We Keep it Simple. Here's How it Works:



GIVE

Start your donor-advised fund with as little as \$5,000 in cash, assets or investments.



GROW

While you decide which charities to support, your donation grows tax-free, boosting your impact.



GRANT

Recommend grants to IRS-qualified charities anytime and support what matters most.



THE TAX-SMART WAY TO GIVE

A DAF allows you to donate appreciated assets without paying capital gains taxes while maximizing income tax deductions.

- ✓ **Cash:**
Deduct up to 60% of AGI
- ✓ **Publicly Traded Securities:**
Deduct up to 30% of AGI
- ✓ **Closely Held Stock or Real Estate:**
Deduct up to 30% of AGI

YOUR PERSONAL PHILANTHROPIC ADVISOR

When you partner with Pinellas Community Foundation, you gain a **personal philanthropic advisor** to help align your giving with your passions and build a lasting legacy. With \$100M+ granted to local causes, our expertise empowers you to give with confidence.



DAF—SMART, SIMPLE GIVING WITH PCF



Take control of your philanthropy with ease! PCF's secure online donor portal gives you 24/7 access to your fund, making it simple to manage your giving with confidence and convenience.



24/7 Online Fund Management


With just a few clicks, you can:

- ✓ Recommend grants anytime, anywhere
- ✓ Track your giving history to stay organized
- ✓ Make new contributions with ease
- ✓ Check your fund balance at a glance
- ✓ Download fund statements for financial planning
- ✓ Connect with your PCF philanthropic advisor for expert guidance
- ✓ Access your fund anytime from any device!

Strategic Giving: How DAFs & Bundling Work

Many donors are now choosing to "bundle" their charitable giving to take advantage of tax benefits while maintaining regular support for their favorite causes.

- ✓ Bundle multiple years' worth of donations in a single tax year to maximize deductions
- ✓ Use your DAF to distribute grants over time while keeping your giving consistent
- ✓ Optimize your tax strategy while continuing to support the nonprofits you care about

 **PCF Pro Tip:** A DAF helps you give strategically, ensuring your philanthropy is both impactful and tax-efficient!

With **PCF's Donor-Advised Fund**, you can streamline your philanthropy, maximize tax benefits, and make an even bigger impact.

- ✓ Simple and streamlined setup process
- ✓ 24/7 online fund access
- ✓ Expert philanthropic guidance

Contact our team to get started today!

READY TO AMPLIFY YOUR GIVING?



Meg Lokey
Director of Philanthropy
mlokey@pinellascf.org
727-306-3142

