

# MOVE YOUR DONOR ADVISED FUND TO PCF

*Philanthropy That Feels Personal—Because It Is*

At Pinellas Community Foundation, you're more than an account, you're a partner in impact. We offer a donor advised fund (DAF) experience that's:

- ✓ **Personalized** — You'll work one-on-one with a dedicated philanthropic advisor who understands your values, goals, and legacy.
- ✓ **Local** — Your giving stays close to home, supporting the causes that matter in Pinellas County.
- ✓ **Connected** — Enjoy invitations to events that matter: nonprofit site visits, exclusive gatherings, and our signature Bus Tours.
- ✓ **Experienced** — With 55+ years of community investment, we help your generosity do the most good.
- ✓ **Welcoming** — Visit our Clearwater office anytime—your questions are never too small.



"We **care about the community** as much as you do. That's what makes us the **right partner**."

*Duggan Cooley, CEO at PCF*



## A BETTER WAY TO GIVE

With a DAF at PCF, you'll benefit from:

- ✓ Flexible giving: contribute cash, stock, or complex assets
- ✓ Easy grantmaking: online, by phone, or through your advisor
- ✓ Family engagement: involve the next generation in your philanthropy
- ✓ Peace of mind: we vet all nonprofits to align with your intent
- ✓ Personalized support: real relationships, not call centers
- ✓ Successor advisors: name who carries your legacy forward

# PCF vs. National DAF Providers



## WHAT SETS US APART? EVERYTHING THAT MATTERS TO YOU.

When you choose PCF, you're choosing trusted local partnership, personalized service, and a community-centered approach that national DAF providers simply can't match.

Feature	Pinellas Community Foundation	Big Banks and National DAFs
<b>Personal Advisor</b>	✓ Real relationship & guidance	✗ Online-only or call centers
<b>Local Knowledge</b>	✓ Deep roots in Pinellas	✗ Little or no local focus
<b>Exclusive Invitations</b>	✓ Events, tours & nonprofit visits	✗ Not available
<b>Community Care</b>	✓ Mission-aligned & community-driven	✗ Profit-centered
<b>Fee Impact</b>	✓ Low fees that go back to support the community	✗ Fees go to shareholders
<b>Visit Us</b>	✓ Come meet your team!	✗ Limited or no local office
<b>Minimum to Open</b>	✓ \$5,000	✓ Similar



## DAF TRANSFER MADE SIMPLE

We'll walk with you every step of the way:

- 1 Connect with PCF – We'll help you outline your giving goals and draft your new DAF agreement.
- 2 Sign & Set Up – You review and sign your new Donor Advised Fund agreement with us.
- 3 Recommend a Transfer – Request a grant from your current DAF sponsor to fund your new DAF at PCF.



**That's it! Your fund will be up and running in no time, with a dedicated advisor ready to support your charitable journey.**

*We'll walk you through every step and coordinate with your financial team if needed.*

**"GIVE WHERE YOU LIVE—WITH PEOPLE WHO LIVE IT, TOO."**

Pinellas Community Foundation is a 501(c)(3) nonprofit organization registered with the state of Florida. A copy of the official registration and financial information for Pinellas Community Foundation (CH3646) may be obtained from the Division of Consumer Services by calling toll-free within the state 1-800-HELP-FLA (435-7352) or visiting [www.FDACS.gov](http://www.FDACS.gov). Registration does not imply endorsement, approval, or recommendation by the state. Your gift may be tax-deductible; please consult your tax professional to explore your benefits.