



DONOR ADVISED FUND

Your fund. Your choice.

Keeping you in the driver's seat of your philanthropy. That's the promise of a Donor Advised Fund at Gulf Coast Community Foundation. You make a tax-deductible gift to create (or add to) your fund, and then you recommend grants to the charities you choose—anywhere, at any time.

Gulf Coast's knowledgeable staff works closely with you and your team of professional advisors to ensure the legal and financial oversight that your giving deserves. We also work *for you*, so you can focus on what matters most: making an impact on your favorite organizations and causes. Open to learning about new charities and projects to support? We can help with that too.

A Donor Story

A newly retired couple who relocated to the Gulf Coast region had generously donated to charities that help children up north. But they didn't really know the nonprofits in their new hometown, despite having vacationed here for many years. To get more involved in our community, they set up a donor advised fund at Gulf Coast Community Foundation.

Our staff asked them about the kinds of charities they love, and soon we introduced them to several organizations doing great work with kids. They were so impressed, they have made grants from their fund to every one! They even got involved as volunteer mentors and tutors at one of the nonprofits, giving their time and wisdom as well as their financial support.

Any of these sound like you?

- You write a lot of checks to charity or have a private foundation.
- You seek guidance on where to give and what assets to donate.
- You want a tax deduction this year but want to support your charities over time.
- You want to involve your family in your giving.
- You have appreciated assets, such as stocks or real estate.
- You want the option to remain anonymous.

If so, then we should talk!

Why Partner with Gulf Coast Community Foundation?

Ease and convenience. Create your fund in a matter of minutes, and eliminate headaches and paperwork by leaving all the details to us.

Flexible giving. Add to your fund anytime, with a variety of giving options, including stock or real estate. Then recommend grants on your own schedule, with no geographic restrictions or annual minimums or maximums.

Tax advantage. Earn the maximum tax benefits for your generosity, so your philanthropy can go even farther in meeting your goals.

Investment management. Pool your fund with others in one of our investment strategy options, or let your own professional advisors continue to manage the investments in partnership with us.

Expert insight. We offer unparalleled knowledge in our region of high-performing nonprofit organizations, emerging community needs, and strategic philanthropy.

Community connection. We'll connect you with the best nonprofits and most effective charitable projects to match your interests. We can also introduce you to like-minded donors who love their community like you do.

Concierge service. Whether you access your fund through our secure online portal or call our Philanthropy Team, we are available anytime to help you. We also offer special donor events and learning opportunities.

Amplified impact. Gulf Coast will leverage your giving with that of other donors and our own community investments, ensuring your philanthropy makes the greatest possible difference.

READY TO GIVE?



- 1 Choose what to give. You can use cash, stock, real estate, or nearly any other asset.**
- 2 Receive the maximum tax deduction allowed by law.**
- 3 Choose your fund's name and succession plan.**
- 4 Decide how your gift will be invested. You may pool your fund with others at Gulf Coast or let your own advisor continue to manage the assets in it.**
- 5 Recommend grants from your fund any time to qualified charities with no geographic restrictions.**
- 6 Enjoy the impact of your generosity!**

About Gulf Coast Community Foundation

Together with our donors, we transform our region through bold and proactive philanthropy. Gulf Coast is one of the fastest-growing community foundations in the country, with over 1,000 families, individuals, organizations, and businesses that have established funds here. The foundation was created in 1995 through the sale of the Venice Hospital. Since then, together with our donors, we have invested over \$400 million to improve health and human services, education, arts and culture, the environment, and civic and economic development.

Learn more at GulfCoastCF.org.

**GULF COAST
COMMUNITY FOUNDATION**

941.486.4600 | GulfCoastCF.org