

The mission of the Episcopal Church Foundation (ECF) is to strengthen the leadership and financial capabilities of Episcopal congregations, dioceses and related organizations. In keeping with this vision, ECF has created a Donor-advised Fund (DAF) program to address the philanthropic needs of our constituents and friends.

ECF is your resource for endowments, planned giving, and high-impact philanthropy through donor-focused options.

Please contact Jim Murphy at ECF to learn more about establishing an ECF Donor-advised Fund or transferring an existing fund. You can reach Jim at 800-697-2858 or [jmurphy@episcopalfoundation.org](mailto:jmurphy@episcopalfoundation.org).

Visit ECF's dedicated Donor-advised Fund website: [www.episcopalfoundation.org/programs/daf](http://www.episcopalfoundation.org/programs/daf)

## DONOR-ADVISED FUND



*Your Gift,  
Your Way!*

**SIMPLIFY AND ENHANCE  
YOUR PHILANTHROPY**

**FLEXIBLE • EASY  
CUSTOMIZED • IMPACTFUL**



You can establish your ECF Donor-advised Fund (DAF) today with a minimum irrevocable gift of \$2,500, and then recommend grants to one or more organizations, including your congregation and local ministries as well as other charities that are close to your heart.

### **GIVE YOUR WAY**

You recommend the amount of each grant, the recipient and the timing and can also schedule recurring grants. Please note that ECF's program requires that a majority of the grants from your Donor-advised Fund be made to Episcopal entities. ECF staff can assist in selecting charities that fit your priorities and meet your goals.

### **SIMPLIFY YOUR PHILANTHROPY**

Without the complications of a family foundation, or the time entailed in writing checks for your contributions, an ECF Donor-advised Fund makes it easy for you to consolidate your giving while eliminating the burden of paperwork and grant administration. ECF will take care of all of that for you. And round-the-clock access to ECF's dedicated online portal means that you can request distributions to specific charities at any time.

### **ENJOY THE ADVANTAGES OF ECF'S DAF**

Avoid the cost of multiple transfers of assets, by making a single donation for an immediate tax deduction, then recommend multiple grants—as small as \$100 each—over time, all accomplished online at your convenience.

### **PROTECT YOUR PRIVACY**

You can make any or all grants anonymously if you wish.

 **EPISCOPAL CHURCH FOUNDATION**

475 Riverside Drive, Suite 750 | New York, NY 10115  
800-697-2858 | [www.episcopalfoundation.org](http://www.episcopalfoundation.org)





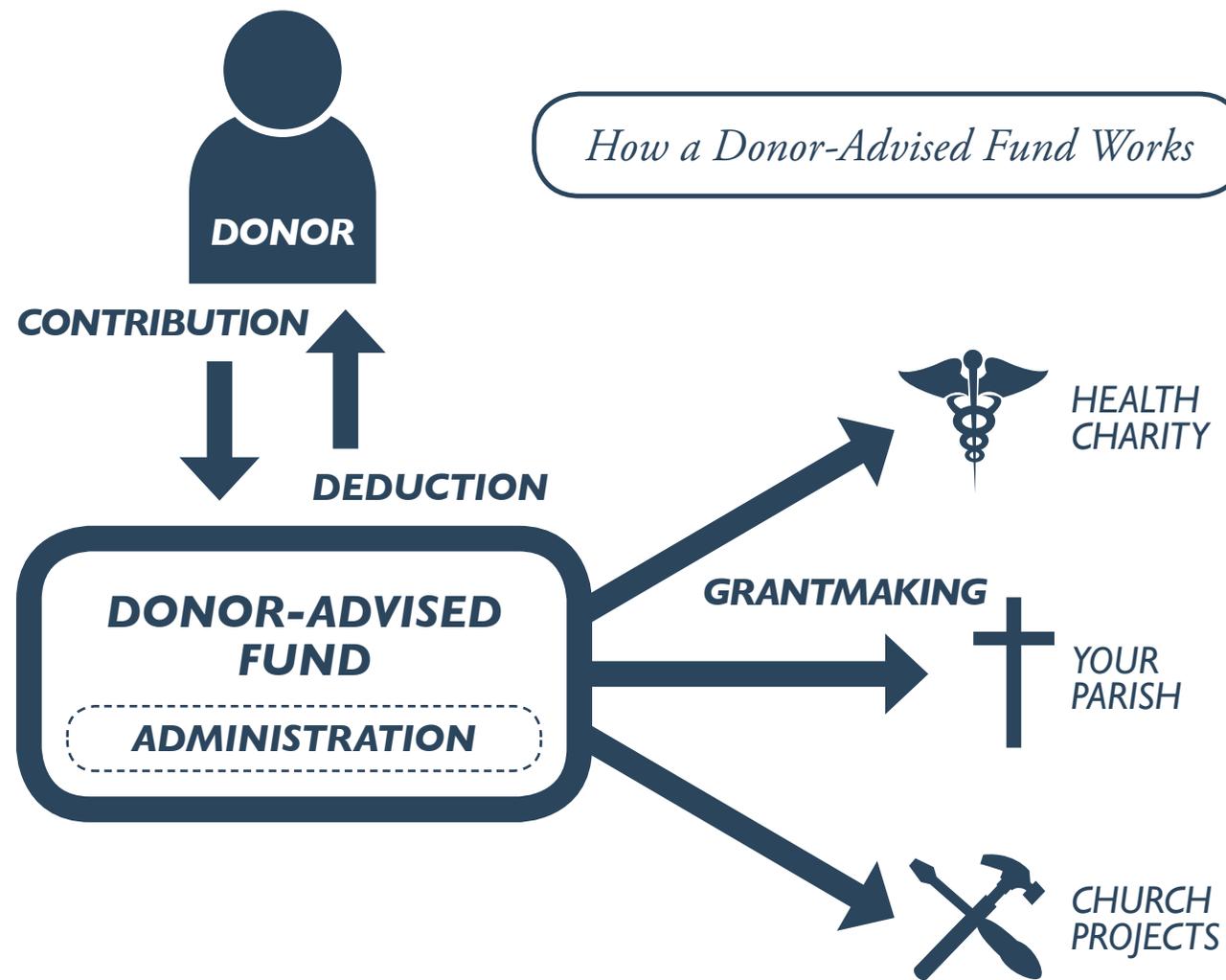
### BENEFITS OF A DAF

You will receive an immediate tax deduction for the maximum amount allowed by law, but you do not have to decide now which ministries or other organizations you wish to support. You can take the time you need to recommend grants, and add to your fund at any time.

### USE ECF'S ONLINE DAF PORTAL:

- Access 24 hours a day
- View current DAF account value
- Add to your fund
- Choose new grant recipients now or in the future
- Recommend grants for as little as \$100 each at any time

## How a Donor-Advised Fund Works



### CONTRIBUTION

You make an irrevocable contribution of assets.

### DEDUCTION

You receive an immediate tax deduction, the maximum allowed by IRS.

### ADMINISTRATION

You name your donor-advised fund account, advisors, and successors or ultimate charitable beneficiaries. ECF places your contribution in a donor-advised fund account, so it can be invested and grow tax-free.

### GRANTMAKING

You recommend disbursement from your account to qualified charities, at a time and on a schedule of your choosing.\*

*\*Grants may not be made to fulfill pledges or membership commitments or in exchange for any benefit to the donor.*

**CHOOSE HOW YOU GIVE:**

- Cash or debit/credit card
- Appreciated securities
- Real estate
- Non-traditional assets

### SELECT YOUR INVESTMENT OPTIONS

You may recommend from among numerous investment choices—including socially responsible options—depending on your personal short- and long-term goals for making grants. Investment/administrative fees are kept to a minimum to enhance your philanthropy.

### LEAVE A LASTING LEGACY

Similar to a family foundation, but without some of its complications, you can ensure that granting continues after your lifetime by naming a successor to take your place as grant advisor. You also have the option, when setting up your DAF, to designate an ultimate gift of the remainder of your DAF to the organization of your choice, or to create a permanent endowment.

