

Donor Advised Fund

Flexible giving with a personal touch

OUR PARTNERSHIP

Partnering with our fund advisors, we offer expert guidance while providing the opportunity for hands-on philanthropic impact. The Waukesha County Community Foundation (WCCF) is committed to practices that honor donor intent and connect to community needs.

OVERVIEW

A Donor Advised Fund (DAF) is a giving vehicle that provides immediate tax benefits and allows you to actively support charities of your choice through grant recommendations.

HOW IT WORKS

- 1 Donor contributes assets to the WCCF.
- 2 Donor evaluates and recommends nonprofit grant recipients with the assistance of expert staff.
- 3 WCCF Board of Directors reviews grant requests monthly.

MINIMUMS & FEES

The minimum to establish a Donor Advised Fund is \$25,000. Administrative fees are assessed quarterly according to the tiered structure below. Investment management and consulting fees related to the WCCF's investment pools are charged separately.

ASSET AMOUNT	ADMIN FEE
assets up to \$1M	1.00%
assets \$1M - \$4M	0.80%
assets over \$4M	0.30%

IMPORTANT LEGAL DISCLOSURE

The information provided is general and educational in nature. It is not intended to be, and should not be construed as, legal or tax advice. The Waukesha County Community Foundation does not provide legal or tax advice. You should consult with your tax advisor to properly determine the tax consequences of making a charitable gift to the Waukesha County Community Foundation.

Contributions to the Waukesha County Community Foundation represent your irrevocable gifts subject to the legal and fiduciary control of the WCCF's Board of Directors.

IN 2022 DONOR
ADVISED FUNDS
GRANTED MORE THAN

\$1.5
MILLION

BENEFITS

- Receive the maximum tax deduction
- Ability to give complex assets
- Efficient and flexible
- Active role in grants process
- Name successor advisors to continue philanthropic legacy
- No minimum distribution percentage requirements

CONTACT US

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