



FUND OVERVIEW

Donor Advised Fund for Corporate Philanthropy

A donor advised fund through Winona Community Foundation provides a simple, flexible and tax-efficient way to streamline your corporate giving. The company makes a gift to establish the fund and then remains actively involved in suggesting grants from the fund to nonprofit organizations. The ease of use and potential tax advantages make donor advised funds the fastest-growing charitable giving vehicle in the nation.

HOW IT WORKS



GIVE TO YOUR FUND



INVEST FOR GROWTH



GRANTS TO NONPROFITS

- Make a gift to the community foundation of cash, appreciated stocks, real estate or other assets.
- We set up a fund in your name, in the name of your family or business or in honor of any person or organization you choose.
- You recommend grants from the fund to your favorite nonprofit organizations.
- Your business may receive tax benefits in the year your gift is made.
- Our professional staff ensures the nonprofits you wish to support are in good standing.
- Our team is available to help you learn about new organizations doing good work that aligns with your interests in the community.



**WINONA
COMMUNITY
FOUNDATION**

A BETTER APPROACH

From Tedd and Tracy Morgan of Thern: Over the years we have realized the convenience and benefit of setting aside funds on a regular schedule that works for Thern. This allows us to build a fund managed by the WCF. It is good to know that the dollars in the fund are invested and growing under the diligent care of the WCF. Thern is able to level out contributions to ease the burden on cash flow, while also being able to immediately process contributions as charitable donations, regardless of how much time passes between the time of contributing to our fund managed by the WCF and the time of distributing dollars to other organizations in and around the community as part of our charitable giving program. WCF is able to vet different organizations, to help us make sure they are qualified as charitable organizations. WCF also helps us track our giving, so we can easily and effectively manage our annual Give Back budget, and the process for submitting distributions is simple and timely.

10 REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION

1 We are a **local organization** with deep roots in the community.

2 We have **broad expertise** regarding community issues and needs.

3 We provide highly **personalized service** tailored to each individual's charitable and financial interests.

4 Our funds help people **invest in the causes** they care about most.

5 We accept a wide **variety of assets** and can facilitate even the most complex forms of giving.

6 We partner with **professional advisors** to create highly effective approaches to charitable giving.

7 We offer maximum **tax advantages** for most gifts under state and federal law.

8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants.

9 We build **endowment funds** that benefit the community for decades and help create personal legacies.

10 We are a **community leader**, coordinating collaborative resources to create positive change.

FUND OVERVIEW DONOR ADVISED FUND FOR CORPORATE PHILANTHROPY

- We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously).
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent

OTHER ADVANTAGES

Donor advised funds provide a way for your business to show it cares about its local community and raise awareness about community needs. This type of fund can also strengthen employees' relationships with one another and within the community by providing an enriching, shared giving experience.

A donor advised fund is typically less costly and less time consuming to administer than other forms of philanthropic giving (such as a private foundation), but it still allows you to establish a charitable legacy in the name of your business and fulfill multiple charitable interests.

By working through the community foundation, your charitable gift qualifies you for maximum tax advantage under federal law, and you take advantage of the expertise of professional program staff and investment managers. Your business can establish a fund today and make grant recommendations now or in the future.

LET'S CONNECT

Contact us to learn more about the ways we can help you have a positive impact on the community and causes you care about.



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