



Would you like to make a charitable gift today to create a fund that would enable you and your loved ones to make contributions into the future?

Do you need a charitable deduction today, but not sure which ministries you want to support?

A Donor Advised Fund with The Baptist Foundation of California offers you a flexible and easy-to-establish vehicle to accomplish these and other giving goals.

The Baptist Foundation Can Help

Interested in a Donor Advised Fund? The Baptist Foundation of California staff stands ready to help you consider the advantages of proper estate planning and provide you with documents for review by your personal, legal, and financial consultants. Feel free to call us at the numbers listed below.

The purpose of this brochure is to provide helpful information of a general nature. It is not intended as a source of specific legal or tax advice. Portions of the text are adapted from Crescendo, Inc. Used by permission.



Donor Advised Funds



3210 E. Guasti Road • Ontario, California 91764
Toll Free (877) 322-1001 • Phone (909) 738-4004
info@bfcalf.org • www.bfcalf.org



How It Works

Opening a Donor Advised Fund account is easy to do. When you make a one-time, irreversible, tax-deductible contribution to The Baptist Foundation of California of at least \$10,000, we enter into an agreement with you to open a Donor Advised Fund. We then establish the special account in your name and it is invested to grow over time, permitting you to recommend gifts to qualifying charities and ministries. When you pass away, your children may make recommendations for distributions from the fund.

Recommending Your Gifts To Charity

Once your account is open, simply contact us in writing with your recommendations of how your funds should be distributed. IRS rules dictate that The Foundation must have final approval of distributions. While we are not legally obligated to distribute your funds as you desire, we will seek to honor your wishes to help further the charities and ministries you love.

Donor Advised Fund Example

Bill is 55 and wishes to establish a fund that will make current and future gifts to his favorite charities. Bill makes a gift of \$100,000 to create a Donor Advised Fund and recommends two ministries to receive fund distributions this year. When



Bill passes away, his children can have the right to recommend gifts from the fund. He is thrilled that he can pass on his legacy of giving to ministry to his family with the Donor Advised Fund.*

*The name shown here is representative of typical donors and may or may not be an actual donor to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.



Benefits of a Donor Advise Fund

1. You receive an immediate tax deduction.
2. You and/or your family receive name recognition from the distributions.
3. You are provided the ability to include your children in decisions with ongoing giving to ministry.
4. You are provided with flexibility in recommending periodic charitable distributions.
5. You can achieve the satisfaction of immediate stewardship while retaining the ability to make responsible future distributions.