

How to establish a Donor Advised Fund

Establishing your own Donor Advised fund is easy. Just follow these simple steps:

1. Contact us (phone, e-mail or online) and we will provide an establishing document tailored to fit your needs. Next download and complete the Donor Advised Form and return it to us.
2. The form will ask you questions such as, “What would you like to name your fund?” and “Will anyone besides yourself be granting from the fund?”
3. Contribute to your fund with a gift of cash, stock (including publicly-traded, closely-held and mutual fund shares) or other alternative assets. You will get an immediate tax deduction. When you contribute appreciated stock (or mutual fund shares held for more than one year), you immediately get the full fair market value for your charitable deduction and you’ll avoid long-term capital gains tax.
4. We will set up your fund in our accounting system and on the web site
5. We will send your **username and password** and you can begin managing your fund online
6. Your fund will receive the cash from your contribution, and you can begin granting to support your church, alma mater, or any Catholic Charitable institution that is a 501(C3) organization.

We look forward to having you as a part of our family of giving.. Our staff is here to connect you to the charitable causes you care about in Catholic Community.