

Donor Advised Fund

Establishing a donor advised fund with the Community Foundation of Northeast Iowa provides you the opportunity to be actively involved in making a difference for organizations you care about.

Convenient, Personal, Powerful

For donors who value freedom, convenience, and choice, a donor advised fund is one of the most powerful charitable tools for making your community stronger. Donor advised funds provide a hands-on approach to philanthropy.

Your named fund allows you to support multiple nonprofits and meet community needs as they arise. The Community Foundation supports you through personalized service, using our insight into community need and knowledge of nonprofit organizations doing great work to help increase the effectiveness of your giving.

Getting started is easy. Creating a fund that allows you to make a difference during your lifetime and can impact your community forever is simple. You can use cash, stock, or other assets to create your fund and qualify for tax benefits including the Endow Iowa 25% state tax credit. It takes \$10,000 or more to establish your donor advised fund.

Contact our Development staff at 319-287-9106 or info@cfnea.org to discuss how you can turn your generosity into charitable actions.

“Passing on the grantmaking responsibilities to our children is something we really value. When we are no longer here, our family fund will still be generating income to benefit the community. Our children know the principles that guide us, and they can choose to follow those or to enhance them based on their own experiences.”

DR. BRIAN & SUSAN SIMS
Donor Advised Fundholders
Sims Family Fund

A Simple Way to Give



Start a fund.



Donated assets grow through investments.



Support causes that matter to you.

Start your donor advised fund today by going to cfnea.org.

Key Benefits of

Establishing a Donor Advised Fund

Helping the causes you care about is easy when you work with the Community Foundation to establish a donor advised fund.

Personalized Giving Your fund is your tool for personalized giving. Support the causes and community you love by making grants to multiple projects and needs as they arise throughout the year, all through one convenient charitable account.

Work With Our Staff Our experienced staff can help you make grants that have the most impact on the causes you care about. We have an in-depth knowledge of community needs and projects across our 20-county region. You can access Foundation staff and discuss your charitable intent and we can help you increase the effectiveness of your giving.

Family Engagement Many donor advised fundholders involve family in grantmaking decisions. This generational giving model passes on your philosophy of generosity. Fundholders may also name successor advisors for their fund to continue the family legacy of giving.

Efficient Management The Community Foundation handles all the administrative tasks that assist in best meeting your philanthropic goals. This includes professional management and financial oversight of your dollars to grow the charitable impact of your fund.

The minimum to establish a donor advised fund is \$10,000.

Grantmaking Made Easy

Making grants from your donor advised fund with the Community Foundation of Northeast Iowa is simple. Our user-friendly fundholder portal, available at cfneia.org, gives you 24-hour access to your fund to make grants, review grant history, or see your available to grant balance.



Exploring possibilities to giving back is important to **Dr. David and Karen Zwanziger**. It's one of the reasons the couple uses their donor advised funds with the Community Foundation of Northeast Iowa to focus on impacting children and young families. "A lot of choices are available and I appreciate the guidance of the staff at the Foundation. I toss out a question and let them develop the possibilities," said David.

After David's retirement and sale of his orthodontics practice, their accountant recommended talking to the Community Foundation. "It worked well from a tax and family finance situation," said David.

David and Karen chose to establish two donor advised funds, that provide a forever fund and flexible granting options, providing even greater possibilities for their charitable giving.

Giving during their lifetime is important, but the couple also understand the long-term impact their funds will have. "You always want to consider the long-range impact of what you do. I won't ever see all the impact, but I truly have faith in the long-term benefit to the community."

ABOUT THE COMMUNITY FOUNDATION OF NORTHEAST IOWA

Since 1956, CFNEIA has been a catalyst for positive community change. We do this by supporting nonprofits doing the most good and by helping people who want to do good leave a legacy for their community and the causes they care about. Today, our region includes 20 Iowa counties, and we are proud to partner with our 21 local community foundations in creating vibrant communities.