

10 Reasons to Establish a Donor-Advised Fund at CFL

1. **Local Knowledge.** Our unique role among Lowcountry nonprofits gives us deep insight into their needs and the needs of the community. We can help you maximize your charitable impact.
2. **Flexibility.** CFL Donor-Advised Funds provide more flexibility around the pace of your giving rather than private foundations or commercial fund accounts who typically have annual spending requirements.
3. **Easy Set-up.** You can open a fund in one day at CFL for a little as \$2,500. We also allow you to amend your fund agreement at any time with no additional charge.
4. **Strong Return on Investment.** Our historical performance delivers a 6.5% rate of return. We also offer multiple investment pool options to match your charitable investment strategy.
5. **Competitive Fees.** Our administrative fee is as low as 1% and because we are nonprofit, we reinvest that money back into our nonprofit community. Typically, Donor-Advised Funds are also less costly and easier to administer than having a private foundation.
6. **Dedicated, Personal Support.** You will have a dedicated, local fund steward to assist you—no overseas call centers and no hidden fees for speaking with our staff.
7. **Complex Assets and Minimized Capital Gains.** We can handle donations of complex assets – some commercial funds cannot. If you have appreciated stock, other securities, or property purchased more than a year ago, you can minimize capital gains tax by donating them to your CFL Donor-Advised Fund.
8. **Tax-Free Growth and Maximum Tax Savings.** Your money grows tax-free when invested with us and you will receive the maximum income tax deduction available.
9. **Anonymous Giving.** You can make grants anonymously whenever you choose.
10. **Streamlined Management and Recordkeeping.** We track your donations, provide timely gift acknowledgments, and use professional money managers to grow your fund. You'll enjoy 24/7 access to your fund at our secure online portal and full access to our expert staff.