

Create a Donor Advised Fund to provide financial support to your community and favorite charities.

■ How a Donor Advised Fund Works

A Donor Advised Fund can help you achieve your charitable goals. It is an account that can be established and funded currently. Or, you can name it as a charitable beneficiary of your will, charitable trust, gift annuity, retirement plan or insurance policy.

■ Gifting Advice

Just as the name implies, each year you can advise as to whom, how much and when to give from the fund. You may change the charities that benefit from your fund without the expense of changing wills, trust or legal documents.

With a donor advised fund, you can name successors to carry on your charitable goals. For example, you may name your children, grandchildren or other trusted advisors to carry on your legacy. This will allow you to pass your giving values on to future generations.

■ Investment Advice

You may be able to make suggestions as to the investment advisor that manages the fund's investment. This may enable your own trusted financial advisors to help you accomplish your charitable giving goals.

■ Private

Your Donor Advised Fund is never subject to the public record. This means that your fund will not be solicited by charities except through your own activity.

■ Tax Advantages

Your Donor Advised Fund qualifies for the highest charitable income and estate tax deductions allowed by law, while bypassing capital gains tax on gifts of appreciated assets to the fund.

■ Economic & Administrative Efficiency

You will save time and money with a Donor Advised Fund with the Nebraska Community Foundation. Through economies of scale, your administrative costs will be minimized. Additionally, you won't need to comply with required annual tax auditing and reporting. As a part of the Foundation, these requirements will be performed for you.

■ How We Can Help You

The Nebraska Community Foundation's knowledgeable staff is dedicated to helping you achieve your charitable gifting goal. We want to make this process enjoyable and simple. We do this by offering the following benefits and services without cost:

• Consultation

Includes proposals that outline all tax and financial benefits.

• Support

Assistance to your legal and financial advisors in implementing the plan that best meets your wishes.

Invest in Your Hometown

For more information about the benefits of a Donor Advised Fund, please complete the form below.

Name _____

Address _____

City _____

State _____ Zip _____

Phone(____) _____ Email _____

_____ Please send me more information on how to establish a donor advised fund through the Nebraska Community Foundation.

_____ I would like to receive information on the following planning options:
____ Gifts that provide lifetime income.
____ Gifts that avoid capital gains tax.
____ Gifts that save on estate tax and probate cost.

_____ I would like someone to contact me regarding a private and confidential visit about planning a gift from my estate.

Questions? Contact:

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(402) 323-7341

Jeff Yost
President & CEO
jeffyost@nebcommfound.org
(402) 323-7332

Please Mail or Fax Form to:

Nebraska Community Foundation
P.O. Box 83107
Lincoln, NE 68501-3107

www.nebcommfound.org



Nebraska Community Foundation, Inc.

The Nebraska Community Foundation exists to help concerned individuals mobilize charitable giving to support the betterment of Nebraska communities and organizations. The Foundation is a nonprofit charitable corporation providing financial management, strategic development and education/training services to communities, organizations and donors throughout Nebraska. Started in 1993, the Foundation provides affiliated fund status (allowing communities and organizations to achieve nonprofit charitable status without forming their own nonprofit corporation) to more than 150 communities, organizations and donors. For more information about the Nebraska Community Foundation call 402/323-7330 or visit the website at www.nebcommfound.org.

The single most important factor in community success is involvement of citizens in their community. Your gifts of time, talent and dollars make a difference.

Please consider what a donor advised fund would do for your community and for you.



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Nebraska Community Foundation
P.O. Box 83107
Lincoln, NE 68501-3107

Donor Advised Funds

A Tool for Leaving a Legacy

- √ A Gift for the Benefit of Your Hometown
- √ A Gift with Maximum Tax Benefits
- √ A Gift with Flexibility

For the benefit of an affiliated fund of
the Nebraska Community Foundation



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