

# Why Establish A Donor-Advised Fund At The Dallas Foundation?



## YOU

- Individuals
- Families
- Private Foundations
- Nonprofit organizations
- Companies



## GIFTS

- Cash
- Appreciated securities
- Closely held stock
- Real estate
- Tangible property



## TAX DEDUCTION

Donor receives an immediate tax deduction

## DONOR-ADVISED FUND AT THE DALLAS FOUNDATION



Fund balance invested in one of The Dallas Foundation's investment pools



## GRANTS

Grants are awarded to causes recommended by the donor, in Dallas and beyond

### PERSONALIZED SERVICE

To help you achieve your personal charitable goals, The Dallas Foundation offers highly individualized service. Whether you wish us to work with your professional advisors, facilitate family meetings, or discuss complex gifts, we work with you one-on-one to help create giving plans with meaning and impact.

### DONOR EDUCATION

We provide numerous opportunities for you to become engaged, connected, and informed through educational events, seminars, the Women's Philanthropy Institute, and the Family Philanthropy Institute.

### EXPERTISE

With over 85 years of experience, The Dallas Foundation has deep expertise and knowledge of the philanthropic landscape locally, across Texas, and beyond. Our team of philanthropic advisors can set up site visits, provide research, and help guide you throughout your philanthropic journey.

### LEGACY PLANNING

We can help you develop a charitable legacy that reflects your values and passions. Our team also has specialized experience in multigenerational philanthropy and can help you engage the next generation in family philanthropy.

## QUESTIONS?

Contact Gary W. Garcia, senior director of development  
214-741-9898 or [gwgarcia@dallasfoundation.org](mailto:gwgarcia@dallasfoundation.org)



THE DALLAS FOUNDATION  
Here for Good

When you create a donor-advised fund at The Dallas Foundation, you can organize all of your charitable activities through one expertly managed, cost-effective vehicle. Your gift qualifies for an immediate maximum tax deduction, while allowing you time to decide which organizations you wish to support.