



THE DALLAS FOUNDATION

*Here for Good*

AT A GLANCE

DALLASFOUNDATION.ORG

*We bring together people, ideas, and investments in Greater Dallas so individuals and families can reach their full potential.*



## About Us

The Dallas Foundation is a nonprofit, publicly supported community foundation. Since 1929, our purpose has been to help donors create charitable funds that reflect their interests. As the first community foundation in Texas, we are committed to partnering with all donors in Greater Dallas to help them create and execute their philanthropic vision. And, while we are based in Dallas, The Dallas Foundation works with many donors outside the area to make grants to charitable organizations around the United States and the world.

## The Dallas Foundation Provides:



Education on charitable giving vehicles



Flexibility and tax advantages that surpass those of private foundations



Timely, discreet, accurate advice and assistance to professionals



Efficient, responsive, individualized service



Assistance with bequest and estate planning



Coordination of local site visits to nonprofit organizations



Information on local and national philanthropic trends, emerging and emergency community needs.

## Giving Through The Dallas Foundation

Donors can establish a fund in their name, in a family's name, or in the name of any person or organization they wish to honor. Grants distributed from a donor's fund are awarded in the name of their fund. This person or organization will always be remembered and linked to good works in our community.

## Types of Funds

### Advised Funds

*(Also known as donor advised funds) are typically established by donors who wish to be actively involved in philanthropy. Some donors set up advised funds with family members as the donor advisors. Our donor advisors have the right to recommend gifts from the funds.*

### Scholarship Funds

*Provide financial support for students at any level of education, or fellowships for people who wish to further their professional development.*

### Designated Funds

*Established by a donor to benefit a specific agency or agencies.*

### Agency | Fiscal Sponsorship Funds

*Established by an organization to provide support for its mission and operations.*

### Field of Interest Funds

*Benefit a defined area of charitable activity or a certain group of people.*

### Community Impact Fund

*Benefits the Dallas community at large in the areas of the arts, education, health, and social services.*



## Assets Accepted

### Outright Gifts

Give cash, stocks, real estate, business interests, and other assets.

### Bequest

Designate a portion of an estate.

### Charitable Lead Trust

Trust distributes to a fund at the community foundation a fixed amount for a number of years and then assets go to beneficiary named by donor.

### Charitable Remainder Trust

Trust pays beneficiary for life and then assets transfer to community foundation.

### Life Estate Contract

Donor transfers home to community foundation and still enjoys use while living.

### Retirement Accounts

Donor designates payment to a community foundation and avoids income that is generally considered taxable by the IRS.

## Focusing on the Community

Programs of The Dallas Foundation



Mary M. Jalonick  
Women's Philanthropy Institute



Family Philanthropy Institute



Legacy Society

## Community



Strong and Healthy Start



Companion Animal Welfare



Support for Nonprofit Organizations



Scholarships



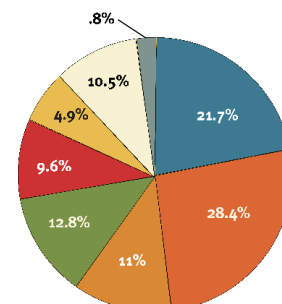
Pegasus Prize



Good Works Under 40 Award

## 2018 Grant Allocations

- Education
- Social Services
- Public/Civil Benefit
- Arts
- Health
- Environment/Animals
- Religion
- International



*We connect donors to the causes they care about.*





# Financial Spotlight 2018

Since our inception, The Dallas Foundation has given approximately \$800,000,000 in grants to more than 6,000 nonprofit organizations.

For the year ending December 31, 2018, the operating budget represented 1.0% of the average market value of our total assets.

# Investment Options

The Dallas Foundation recognizes that no single investment plan can meet every donor’s needs. That’s why we offer a variety of investment options, designed for different levels of risk tolerance and investment time horizons, so that each donor can meet his or her unique philanthropic objectives.

If a fund has an asset balance of more than \$1 million, the donor may request a customized allocation or recommend an outside manager. As with any investment, past performance does not guarantee comparable future returns.

Assets	\$420,227,603
Contributions	\$ 59,037,574
Grants	\$ 62,428,137
Number of Funds	678
Number of Contributions	7,188
Number of Grants	4,274

# Assets in Funds 2018

- Advised
- Supporting Organization
- Designated (Community Funds)
- Agency | Fiscal Sponsorship
- Field of Interest
- Community Impact (Unrestricted)
- Scholarship

