



THE DALLAS FOUNDATION

*Here for Good*

AT A GLANCE

DALLASFOUNDATION.ORG

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



## About Us

The Dallas Foundation is a nonprofit, publicly supported community foundation. Since 1929, our sole purpose has been to help donors create charitable funds that reflect their interests. As the oldest community foundation in Texas, we look forward to helping others serve their philanthropic objectives, now and in the years to come. Although we are a Dallas-based community foundation, 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 Funds

*Established by an agency to provide support for an agency's 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 or 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

Initiatives of The Dallas Foundation

### Donor Services



Women's Philanthropy Institute



Family Philanthropy Institute



Legacy Society

### Community



Early Childhood Education



Companion Animal Welfare



Broad Support for Nonprofit Organizations



Scholarships



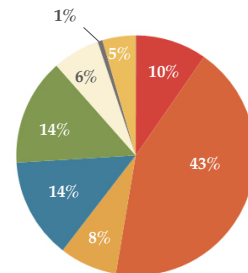
Pegasus Prize



Good Works Under 40 Award

## 2017 Grant Allocations

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



*Our mission is to serve as a resource, leader and catalyst for philanthropy by providing donors with flexible means of making gifts to charitable causes that enhance our community.*





## Financial Spotlight 2017

Since our inception, The Dallas Foundation has given more than \$748,000,000 in grants to more than 6,000 nonprofit organizations.

The Dallas Foundation further strives to keep operating costs to less than 1% of assets. For the year ending December 31, 2017, the operating budget represented 0.85% 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	\$447,792,661
Contributions	\$87,188,689
Grants	\$86,456,073
Number of Funds	587
Number of Contributions	6,983
Number of Grants	8,033

## Assets in Funds 2017

