



The
Dallas
Foundation

Your philanthropic journey
starts here.

Donor Advised Fund



When you partner with **The Dallas Foundation** you help drive the future of the communities and causes you care about.

We know that you want to make the greatest impact possible with your philanthropic gifts. And we know that your philanthropy is unique to you.

Whatever your passions are, The Dallas Foundation powers your philanthropy, serving as a bridge to the causes you care about, to the needs facing our community, and to the tax-advantaged vehicles which amplify your charitable investment.

When you create a donor advised fund at The Dallas Foundation, you can support the same causes you do today and you can explore new opportunities alongside our team of philanthropic advisors.

Your gift to a donor advised fund qualifies for an immediate tax deduction and allows you the time to decide where you wish to make your philanthropic investments.

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Our family has had a trusted relationship with The Dallas Foundation for generations, so we have experienced firsthand the high priority placed on relationships.

We chose to partner with the Foundation because of our desire to be part of a community of donors committed to making an impact and to making Dallas a better place for everyone who calls it home.”

Catherine and Will Rose

The Dallas Foundation Fund Holders

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

The Dallas Foundation offers:

- **Philanthropic advisors & experts** focused on your charitable goals
- **Flexibility** and tax advantages that surpass those of private foundations
- **Timely**, discreet, and accurate professional advice
- **Efficient**, responsive individualized service
- **Legacy planning** for giving beyond your lifetime
- **Coordination** of local site visits to nonprofit organizations
- **Expertise** on local and national philanthropic trends, emerging and emergency community needs
- **Educational programs** such as the Mary M. Jalonick Women's Philanthropy Institute and Family Philanthropy Institute



What is a **Donor Advised Fund** and how does it work?

A donor advised fund is a simple, expertly managed, charitable giving account that allows you to centralize all of your philanthropic activity through one fund.

Gifts of cash, appreciated securities, closely held stock, real estate and other tangible property, may be used to establish a fund, achieving the maximum tax deduction in the year(s) of your gift.

Your gifts are invested, based on your preferences, so they may grow. Once ready, you can recommend grants from your fund to your desired, eligible nonprofits anywhere in the U.S.



1. Establish a Fund

As soon as you set up your fund you are eligible for a tax deduction for the current year.



2. Grow your balance

While you decide on which nonprofits to support, your contributions are invested, and all growth is tax free.



3. Support Nonprofits

When you're ready, support your favorite nonprofit or find a new cause. We do all the paperwork.



4. Leave a Legacy

Continue to express your values and your charitable giving beyond your lifetime.

Why choose The Dallas Foundation?

Taking the next steps on your philanthropic journey requires working with an expert who knows the landscape. For over 90 years, The Dallas Foundation has been a trusted community partner and responsible steward of the generous contributions of donors, with whom we build strong and lasting relationships.

When you choose The Dallas Foundation, you can do so with the assurance that you are embarking on an efficient and fulfilling path to community impact.

First community foundation in Texas with a long history in Dallas.

Has a **clear picture of the greatest needs** and a track record of investing in **transformational solutions**.

Creates powerful networks by leveraging personal passions and strengths.

Convenes the philanthropic community.

Brings together different perspectives and backgrounds reflective of our city's changing demographic composition.

Go-to partner for those who want **Strong and Healthy** families in Dallas and early childhood education initiatives.

“If you want to make an impact, surround yourself with others who want to make an impact.”

Susan Salka

President and CEO of AMN Healthcare and Dallas Foundation Fund Holder



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