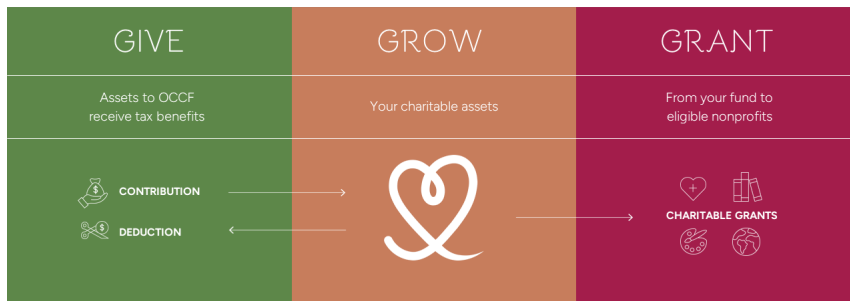


What is a Donor-Advised Fund?

Donor-advised funds (DAF) are the fastest-growing charitable giving vehicle in the United States because they are one of the easiest and most tax-advantageous ways to give to charity.

A donor-advised fund works as a philanthropic account with the sole purpose of supporting charitable organizations and causes close to your heart. Through your donor advised fund at OCCF, you can organize all your charitable activities through one expertly-managed and cost-effective charitable vehicle. Your gift qualifies for an immediate tax deduction, and you can take your time deciding which organizations to recommend for grants. OCCF handles the legal, financial, and administrative burdens, including writing grant checks and tracking results. As a donor advisor, you will have access to our personalized service and planning to ensure your philanthropy is as effective and fulfilling as possible.

How it Works



DAFs at a Glance

An efficient and flexible giving solution that allows you to make grant recommendations on your own timetable. The minimum to establish is \$25,000. Grants can be made to any eligible nonprofit organizations in Orange County, across the country, and around the world. Access a team of experts in charitable giving.

Benefits

- A flexible vehicle that is easy to establish
- Administrative convenience (e.g., consolidation of the management and tracking of tax receipts associated with charitable donations)
- Give complex or unusual assets at fair market value (e.g., real estate, closely-held stock)
- Avoid costly capital gains taxes while realizing the maximum tax-deductibility of your donation with a gift of real estate or other complex assets

Contact us to get started!



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Amplified Giving.
Momentum for Good.