Donor Advised Funds
Charitable Giving Account

Recommending and processing grants to charities:
- Method: Donor makes request to ACCF, 300 College Avenue, Ashland, Ohio 44805.
- Minimum grant: A minimum grant of $250 is recommended (if not using the ACCF distribution policy).
- Processing fees: There are no processing fees.
- Qualifying organization: Any IRS-approved public charity anywhere in the United States. Approval must be given by the Ashland County Community Foundation.
- Grant requests must be received by 11/30. ACCF will review the donor recommendation and if approved, process disbursements, mail checks to recipients and grant reports to the donor. Donors may opt to forego making grants and allow the fund to grow. This will enable them to make larger grants in the future. Should a more frequent distribution schedule be appropriate, details will be arranged with the ACCF office.
- Through its experienced program staff, ACCF offers assistance to the donor in identifying charitable needs, and making grant recommendations.

For more information, please contact:

Ashland County Community Foundation
300 College Avenue
Ashland, OH 44805
Telephone: 419-281-4733
Fax: 419-289-5540
Email: accf@accommunityfoundation.org
www.accommunityfoundation.org

ACCF Encourages Philanthropy for the Generations to Come
- Donor Agent
  Assuring donors’ wishes are carried out
- Grant Provider
  Administering funds to those with needs
- Community Player
  Fully engaged in Ashland County’s future

Using Your Gifts to Build our Community… for Generations to Come.
A donor advised fund is a vehicle through which individuals, families, and companies can create personal “charitable giving accounts” to benefit the charities they care about. In many ways, establishing a donor advised fund is like having your own private foundation to support the causes you believe in without the paperwork and costs that go along with operating one.

**Donor Advised Funds are Appropriate for Those Who:**
- Are looking for “one-stop shopping” management of their charitable giving.
- Want to maximize tax deductions when tax and financial situations support such giving.
- Are looking to incorporate charitable giving into estate planning.
- Own publicly traded securities, closely held stock, real estate or other assets that are highly appreciated.
- Desire local impact—a way to connect to Ashland County’s most pressing needs and promising opportunities.

The fund is established with a minimum initial contribution of $10,000 (payable over a five-year pledge period). You select the name of your fund.

You recommend each November for ACCF’s approval the IRS-approved public charity(ies) to receive your fund’s annual distribution. The distribution is determined based on the Foundation’s Board-approved distribution policy (currently 4% of the fund balance) or the donor recommended amount ($250 minimum). More frequent donor recommendations for distribution may be arranged if appropriate.

ACCF reviews the recommendations and if approved, processes disbursements, mails checks to recipients and annual grant reports to the donor. ACCF offers assistance to the donor in identifying charitable needs and making grant recommendations.

No grant processing fees are charged and any investment and management fees are paid from the fund. A modest annual management fee of 1% of the fund balance is charged based on the Foundation’s fee schedule. Funds incur a minimum annual fee of $100.

Donor Advising includes the donor/designee and if requested a second-generation designee (usually the child of the donor). The original donor may designate (in approved Transfer document) the qualifying charities that are to receive distributions after two generations of donor advice. ACCF holds the principal as a permanent named Fund.