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Brittaney Reep, Chief Financial Officer

Lanie Hartge, Educational Programs Director

Mindy Howman, Executive/Grants Administrative Assistant

*Founding Trustees
+deceased

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.

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

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@acccommunityfoundation.org
www.acccommunityfoundation.org



Confirmed in compliance with National Standards for U.S. Community Foundations.

Donor Advised Funds Charitable Giving Account



Ashland County Community Foundation

Using Your Gifts to Build our Community... for Generations to Come.





WHAT IS A DONOR ADVISED FUND?

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.

HOW DOES A DONOR ADVISED FUND WORK?

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.

Your Legacy

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.

MAKING CONTRIBUTIONS TO A DONOR ADVISED FUND?

- You can make contributions in any amount to your Ashland County Community Foundation account as often as you wish.
- You take a tax deduction at the time the fund is established and carry forward the deduction over the next five years if appropriate.
- Assets accepted: cash, securities, real estate, mutual funds, insurance policies, and others.
- ACCF will recognize the Fund in ACCF correspondence as well as its annual report unless anonymity has been requested.

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.

THE ASHLAND COUNTY COMMUNITY FOUNDATION PLEDGE CARD

I/We wish to contribute to the following:

- Create a new Donor Advised Fund (I would appreciate a call to set up an ACCF office session to establish a fund.)
 - Add to an existing fund
- Fund name _____

Name _____

Address _____

Phone # _____

Email Address _____

Signature _____ Date _____

Please treat gift as anonymous _____

Gift in memory/honor of _____

**All names will be printed in our Annual Reports as written above, unless otherwise noted by you. Your gift is tax deductible as allowed by law. Please make gifts payable to The Ashland County Community Foundation and mail to 300 College Avenue, Ashland, Ohio 44805.