

DONOR-ADVISED FUNDS

"There's a certain pragmatism to having a philanthropic mindset. What do we live for if not to make life less difficult for each other?"

DR. INDIRA LANIG, DONOR-ADVISED FUNDHOLDER



Enhance and streamline your philanthropy

A donor-advised fund at Rose Community Foundation is a charitable giving account created by an individual, family, company or group. Establish your fund and receive the maximum allowable tax benefit for assets contributed including cash, marketable securities, business interest or real property. Recommend grants at any time to 501(c)3 nonprofits of your choosing in the Greater Denver community, across the U.S. and even internationally.

Efficient complement or alternative to a private foundation

As a standalone fund or paired with a private family foundation, Rose Community Foundation manages all investments and administrative functions and your tax and financial information remain private. Maintain your philanthropic identity or give anonymously. Through the Foundation's secure online portal, all fund information is available in one place and you can make grant recommendations any time.

Connect to your community

Tap into the community knowledge and relationships Rose Community Foundation has developed in over 25 years of grantmaking and fund stewardship in the Greater Denver community. Join us for regular donor-focused learning opportunities and workshops.

Services and support for your philanthropy

Our team can help you take your philanthropy to the next level by facilitating mission, vision, and values conversations; helping you develop giving strategies, supporting families working across multiple generations, succession and legacy planning, and sourcing grantees.

Expertly managed investment portfolio

You choose how your fund is invested, either according to the Foundation's asset allocation or an allocation of your choosing. Our investment committee and chief financial officer work with J.P. Morgan's Endowments and Foundations Group to protect and grow the portfolio's inflation-adjusted value over the long-term and to offer fundholders a range of investment options.

Establishing a fund

Opening a fund is simple and requires the completion of our Donor-Advised Fund Agreement. Contribute cash, marketable securities, business interest, real property or through a gift in your will or beneficiary designation. The minimum to open a donor-advised fund is \$10,000. Additional contributions may be made at any time.

Tax status

Rose Community Foundation is a 501(c)3 public charity. As such, all contributions to your fund are tax deductible to the extent allowed by law. Consult your financial and tax advisors to discuss how a donor-advised fund may benefit you.

"The support and expertise offered by the philanthropic services team is amazing and helps our family leverage our gifts to make a bigger impact than we could on our own."

JOY BENENSON, DONOR-ADVISED FUNDHOLDER

THIS INFORMATION IS NOT INTENDED AS LEGAL OR TAX ADVICE. DONORS SHOULD CONTACT THEIR FINANCIAL AND LEGAL ADVISORS PRIOR TO MAKING A GIFT OR LEGACY COMMITMENT.

CONTACT US



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