



**CATHOLIC
FOUNDATION**
OF WEST CENTRAL WISCONSIN

P.O. Box 4004 | La Crosse, WI 54602
608.519.9892 | cfwcw.org



DONOR ADVISED FUND

Flexible. Simple. Charitable.

Giving becomes convenient and personal with a Donor Advised Fund (DAF), which offers a hands-on approach to philanthropy. This fund invests your charitable gift to grow tax-free for future giving. A Donor Advised Fund allows you the opportunity to make contributions to multiple Catholic or public organizations. Donor Advised Funds are one of our most popular funds because they are flexible and manageable from one simple account. It's your "Charitable Checkbook".

You can...

- Open a DAF with **NO** minimum
- Advise when and where to send distributions as small as \$50
- Spend the fund down to zero or grow for future gifts
- Grant to multiple organizations

Key benefits

- The Catholic Foundation's administrative fee is 75 basis points (subject to change), or three quarters of one percent on an annual basis. This is the only fee/cost to you
- Immediate tax deduction with the option of deferred charitable distribution
- Teach charity by naming children as successor advisors to the fund
- Simple, online, 24/7 access to fund details, statements, and gifting
- The Catholic Foundation ensures compliance on your behalf with DAF rules and regulations as mandated by the IRS
- Do all of your giving, including the Diocesan Annual Appeal and your weekly parish offertory
- Learn about the needs of other organizations and how you can provide support

To learn more and to create your own custom giving plan, please contact:

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How does a **Donor Advised** Fund work?



Make a gift



Donate cash, non-publicly traded assets, or easily transfer appreciated stock to the Donor Advised Fund and avoid having to pay capital gains taxes while maximizing your philanthropic dollars.

Support a school, parish, or charity



You can support any 501(c)(3) organization with money in your Donor Advised Fund. The Catholic Foundation will ensure peace of mind that grantees are in alignment with Catholic teachings and values.

Grow the balance



While you're deciding which organizations to support, your donation can potentially grow in investment, making available even more money for charities. Additionally, the balance can grow a Legacy gift upon death.

Let's talk

Who We Serve

The Foundation assists donors throughout the 19 counties of West Central Wisconsin in creating a meaningful impact through planned giving and charitable fund management. Additionally, the Foundation works closely with the charitable entities that the donors designate as beneficiaries, as well as with Catholic organizations who apply for grants.

Why Choose Us

The Foundation ensures Catholics a way to leave their legacy uniquely aligned with their Catholic values and beliefs. Donors enjoy the satisfaction of knowing that their gift directly supports the Catholic organizations that they choose.