



DONOR ADVISED INVESTMENT FUNDS

What if you could make an immense difference in our communities by partnering with other community minded people to help build an Oregon that is fully accepting of all people? What if you could be part of a program that helps people invest in the future of our communities?

We invite you to find out by joining a group of Oregonians who are committed to investing in the future by building charitable donor advised funds with Equity Foundation. Individuals, couples, and families can experience an effective, flexible, and efficient way to make charitable contributions through Equity Foundation's Donor Advised Investment Fund program.

SPECIFICS

Donor Advised Funds are accessible and affordable. An investment of \$5,000 or more will open a Fund. Funds are named by the donors as they request and are listed in Equity Foundation's promotional materials, if authorized. Donor Advisors may request grants be made from their Fund as long as there are adequate funds. They may make additional contributions to their Fund at any time. Since Equity Foundation is a 501(c)(3) non-profit entity, Donors may take immediate tax deductions for their entire contributions to their Funds when they are made.

Equity Foundation also administers Donor Advised Funds which may be endowed at levels of \$50,000 or more. The principle remains untouched and the earnings it produces are used to fund specific programs and services as directed by the Donor, in perpetuity.

Equity Foundation is flexible, responsive and professional. Donor Advised Funds are attractive to many donors because Equity, serving as liaison for funding requests and disbursements, assumes responsibility for managing the funds according to options recommended by the Donor. All contributions to Donor Advised Funds are invested and earnings are returned to each Fund respectively. Investments of funds are currently done through the Trillium Investments, a socially conscious investment company. The Fund management fee of approximately 1% is set by the bank and is charged quarterly.

Distributions from Donor Advised Funds to non-profit organizations may be made monthly. Most tax-exempt organizations are eligible for grants from your Fund as long as they are a designated 501(c)(3) by the IRS, and have appropriate non-discrimination policies. The Equity Foundation Board reviews and approves all distribution requests. Donor Advisors may appoint co-advisors, and successor advisors may be named to continue the Fund beyond the donors' lifetime.

Advantages to Having a Donor Advised Fund with Equity Foundation

- ▶ Being a Donor Advisor creates networking opportunities with other Donor Advisors to support and further develop philanthropic interests.
- ▶ Many Donors appreciate partnering with other Equity Foundation Donor Advisors to leverage their gifts. As a Donor Advisor you receive information about community programs and projects, screened by Equity's Granting Committee.
- ▶ Contributions to Equity Foundation provide immediate tax deductions for the Donor Advisors, who then may make disbursements from their Funds at the times and amounts they choose.
- ▶ Having a Fund is a very convenient way to manage charitable contributions. Donor Advisors need only to complete a simple form for each requested disbursement and fax or mail their requests to the office. Equity Foundation will take care of the rest.
- ▶ During Equity Foundation's annual General Cycle granting program, proposals are reviewed by members of the Granting Committee which make recommendations to the Equity Board. Donor Advisors will receive information about the organizations selected to receive grants from Equity Foundation and, if they are interested in the work done by any of the recipient organizations, they may elect to partner with Equity by adding additional contributions from their individual Funds.
- ▶ Donor Advisors receive quarterly reports from Equity Foundation on their respective funds, which include statements of revenues and expenditures, and lists of contributions made.
- ▶ A Donor Advised Fund provides Donors and family members' opportunities to decide together where their contributions would do the most good, thus encouraging philanthropy in present and future generations.
- ▶ A Donor Advised Fund provides a vehicle for a planned gift as a living legacy.
- ▶ Having a Donor Advised Fund with Equity Foundation reflects that the Donor values diversity and all the protections named under the Civil Rights Act, as well as sexual orientation and gender identity.

ABOUT EQUITY FOUNDATION

Equity Foundation, founded in 1989, works to inspire philanthropy and support non-profit organizations throughout Oregon that further its mission to *build communities that embrace the dignity and worth of all people*. Equity Foundation works to promote positive interaction through grants and outreach to LGBTQ and other allied communities.

Since its founding, Equity Foundation has given nearly two million dollars in grant money through its vigorous participation in Workplace Giving Campaigns, its Planned Giving program, its Donor Advised Fund program, its General Cycle Grants, and Scholarship programs. Equity Foundation works to educate the broader community about the importance of charitable giving, creating an inclusive society, fully accepting of all people and nurturing a sense of dignity and worth in each of us.

If you can imagine living in a world where the worth and dignity of each person is recognized and respected, a place where our interactions with others lie in cooperation and in embracing all members of our greater community, we invite you to join us.