



# DESIGNATED FUND

GIVE WITH PURPOSE



*"We wanted to utilize the wisdom, guidance and support of the Hamilton Community Foundation to help us as we started our nonprofit Experience."*

*-Bret and Krista Parrish*

## A PERSONAL CONNECTION

For Bret and Krista Parrish a Designated Fund was the perfect fit for their charitable goals.

In 2015 the Parrishes established the Experience Fund, a Fund with a specific goal to be accomplished through the Boys and Girls Club of Hamilton. The goal of the Fund is to provide experiences to local children they may not otherwise have the opportunity to encounter, such as trips to the Aronoff or to FC Cincinnati games.

"As a teacher it is very apparent, and backed by studies, that students who have rich background experiences make connections in the classrooms that help toward academic success," says Krista.

By choosing to create a Designated Fund, Bret and Krista are creating lifelong memories for local youth.

## BENEFITS OF A DESIGNATED FUND

**Opening a Donor Designated Fund** allows you to support the good work of a specific nonprofit organization or project. Because it's given through your Community Foundation, your gift provides the organization you select, not only funding, but also planned giving and investment management services with the power of endowment.

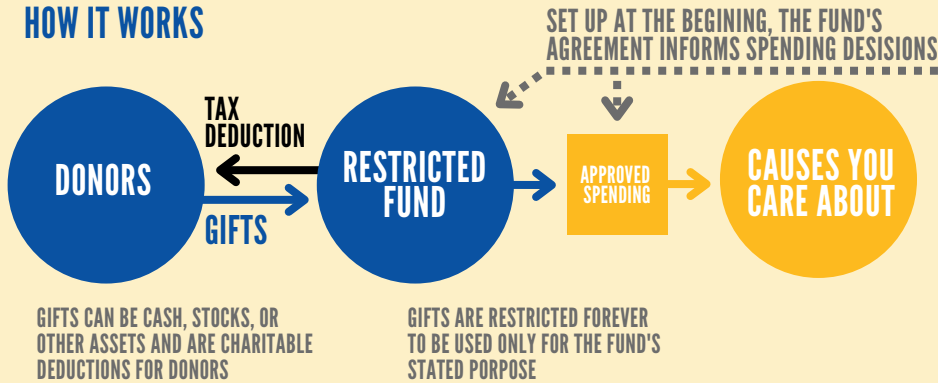
- ♥ **Give where you want** | You identify the non-profit, school, church, or government agency that the fund will benefit, anywhere in the country.
- ♥ **Simplify your deductions** | Each gift to your Fund is tax deductible in the year it's made, not with each distribution of funds.
- ♥ **Benefit from market appreciation** | With a Designated Fund you have the option to invest and grow your gift alongside the Foundation's other assets.
- ♥ **Maximize your tax benefit** | Designated Funds can be funded through required minimum distributions of retirement accounts. Additionally, you can give in one year and then gifting over time.
- ♥ **Secure online access** | You can view your fund balance and see the impact your Fund is making.

# GIVE LOCAL FOR LOCAL IMPACT

EVERY GIFT SUPPORTS OUR COMMUNITIES' LEGACY

## WHY GIVE THROUGH THE FOUNDATION?

### HOW IT WORKS



A Designated Fund provides you a wonderful way to give back to one or more specific organizations that have touched your life. Your gift provides more than just funding— your favorite organization will benefit from your Community Foundation’s investment, stewardship and ability to manage endowment funds. Because your Community Foundation handles the details, the nonprofit organization’s staff is freed up to focus on its mission. And, the Community Foundation can facilitate even the most complex forms of giving, such as planned gifts or gifts of appreciated stock or real estate. You can add to the Fund at any time. If the organization you select ceases to exist or changes in mission, the Fund can be redirected so that it continues to address your charitable intent.

### STAFF SUPPORT

Our staff offers expert understanding of community needs, delivering personalized service that aligns with individual charitable and financial interests.

### GIVING EXPERTISE

We work with you or your financial advisor to offer flexibility, accepting donations in the form of cash, stocks, bonds, or other complex forms for giving. These gifts usually qualify for maximum tax benefits.

### STAYING POWER

Since 1951 we have established enduring endowment funds that perpetually benefit the community and create lasting legacies for our donors. With over \$150M under our care, we have the stability to ensure these legacies continue to make a positive impact forever.

### COMMUNITY LEADERSHIP

As a community leader, we bring together various agencies and coordinate resources to enact positive change. By choosing to give through us, you're not just contributing to a cause, but bolstering and expanding our collective impact on the community.

## CALL US TODAY!

For more information on how the Hamilton Community Foundation can help you with your charitable giving contact:

**Jacob Stone-Welch**

Director of Donor Services

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