

Donor Advised Funds



Establish a Seton Foundations or Dell Children’s Foundation Donor Advised Fund at the Austin Community Foundation and join hundreds of individuals and families benefiting from our exemplary service, local expertise and efficient resources to simplify your giving and maximize your impact.

Seton Foundations and Dell Children’s Foundation Donor Advised Funds are administered through a partnership with the Austin Community Foundation. The funds are held and managed by ACF. Seton Foundations and Dell Children’s Foundation work in partnership with ACF to provide donor services and philanthropic advising to fundholders.

BENEFITS AND SERVICES

- Immediate charitable deduction for your gift (maximum amount allowable by law)
- Ability to consolidate all your charitable giving
- Ability to accept complex gifts - cash, appreciated stock, privately held stock, business interest, real estate, and other assets
- Option to invest in market or not
- Invested funds may be permanent (endowed) or 100% available for granting (quasi-endowed)
- Pass-through giving to Seton Foundations and/or Dell Children’s Foundation (ex: complicated asset or desire for confidentiality)
- Easy and secure access to fund 24/7 through online donor portal
- Make grants online any time
- Invitations to exclusive fundholder events and networking opportunities
- Build a closer relationship with Seton Foundations and/or Dell Children’s Foundation
- More easily manage and budget your giving to Seton Foundations and/or Dell Children’s Foundation

You may open a Donor Advised Fund with a gift of cash, appreciated stock, mutual fund shares, closely held stock, real estate, retirement account, life insurance or a bequest or another deferred gift.

Type of Fund	Endowed & Quasi-Endowed Funds	Non-Endowed Funds
Fund fee	<p>Tiered Fees:</p> <p>Below \$1,000,000 – 1.0% Assets</p> <p>\$1,000,000+ - 0.75%</p> <p>\$3,000,000+ - 0.50%</p> <p>Fees are assessed at the rate of 1/12th of the fee on the average balance of fund each month.</p>	<p>Tiered Fees:</p> <p>Below \$1,000,000 – 1.50% Deposits</p> <p>Above \$1,000,000 – 1.00%</p> <p>Annual fee: \$100</p> <p>Fees are assessed on deposits monthly.</p>
Additional fees	Investment expenses average 0.25-0.8% depending on investment option. Fee includes investment counsel.	
Fund minimum	\$5,000	No minimum

Additional fees apply for gifts made with credit card. The spending policy for endowed funds provides for a maximum available for granting and is calculated as 4% of the average trailing 20 quarters of the fund’s market value.

Simplify your giving. Maximize your impact.



If you love Austin and want to make the biggest impact in the most efficient way, then we're the perfect giving partner for you.

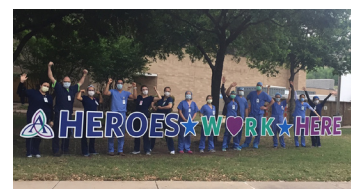
Austin Community Foundation has helped community-minded people reach their philanthropic goals since 1977. The Seton Foundations and Dell Children's Foundation DAF partnership provides opportunities for donors to support Ascension Seton and the Central Texas community. Commit to the causes you care about, budget for your strategic giving and make a plan for positive change in our community.



WHY WORK WITH US?

Here's why the Austin Community Foundation is the ideal partner for your charitable work:

- 1 You join a community of givers.** When you open your fund at the Austin Community Foundation, you join a community of individuals, families and companies committed to making a local impact through collaboration, leadership and leveraging resources.
- 2 You can count on us to be creative, flexible and efficient.** Maximize your giving with our charitable products and services that support your unique vision and goals. We can help you make the most of appreciated assets and high-earning years.
- 3 You gain access to local philanthropic experts.** We can provide you with unique experiences and the chance to learn about current needs and emerging opportunities across Central Texas for your grant-making or impact investing.
- 4 You gain access to investment experts.** We support your charitable investment strategy, including impact investing, whether your focus is now or long-term, to ensure your giving goes further in our community.
- 5 You invest in Austin.** When you invest your charitable dollars with us, you invest in Austin and Central Texas. You help make possible unique problem-solving collaborations, strategic grant-making and local impact investment.



The Austin Community Foundation Advantage



	Seton Foundations/ Dell Children's Foundation DAF	National Commercial Donor Advised Fund	Private Foundation
Highest charitable tax deduction	✓	✓	
Donate complex gifts	✓		✓
Cost-effective (no accounting or tax return expenses)	✓	✓	
Give locally, across US & abroad	✓	✓	✓
Exclusive opportunities to learn, leverage & lead	✓		
Personalized service & local knowledge	✓		
Support for your strategic grant-making	✓		
Impact investment option	✓		✓
No excise tax	✓	✓	
No minimum payout	✓	✓	
Maintain current investment manager (\$500,000 minimum)	✓	✓	✓

HOW IT WORKS

- Austin Community Foundation is a tax-exempt organization under 501(c)(3) of the IRS code; that means funds given to the Foundation or its funds are immediately tax deductible to the extent allowable by law.
- A Donor Advised Fund, allows you to receive an immediate charitable tax deduction and then take the time you need to decide what nonprofit organizations will receive your gift or gifts.
- You can donate complex gifts including publicly traded (or closely held) securities, business interests, oil/gas/mineral/timber rights, real estate, life insurance, gifts through wills and retirement plan assets.

ABOUT US

Austin Community Foundation is the catalyst for generosity in Austin. We bring together philanthropists, dollars and ideas to shape Austin's future, today. A trusted local partner, we have a 40-year track record of investing in Austin, granting more than \$300 million to nonprofits across Central Texas since 1977. Our data-driven approach means we seek to understand, inform and invest in the areas of greatest need to narrow the opportunity gap in Central Texas. Together, we are shaping Austin's future, today.

Austinconf.org

Ready to Establish Your Seton Foundations or Dell Children's Foundation DAF?
Contact Us at **SUPPORTSETON@ASCENSION.ORG**