



YOUNGSTOWN STATE UNIVERSITY
FOUNDATION



COMMUNITY
FOUNDATION
— OF THE MAHONING VALLEY —

Donor Advised FUNDS

The Youngstown State University Foundation in conjunction with the Community Foundation of the Mahoning Valley is offering Donor Advised Funds to benefactors interested in philanthropically impacting YSU and the non-profit community in the Mahoning Valley. A Donor Advised Fund (DAF) offers a hands-on approach to philanthropy, allowing individuals and families to support YSU and charities of their choice through distribution recommendations at any time.

Through a YSU Foundation and Community Foundation DAF, at least 50% of charitable distributions must be made to YSU or the YSU Foundation. As an efficient, cost-effective alternative to a private or family foundation, a DAF receives personalized service from the Community Foundation experienced staff who can help you develop your charitable giving strategy and goals.

CONSIDER A DONOR ADVISED FUND IF YOU:

- Want a simple and flexible instrument for charitable giving that is easy to establish
- Desire to include your family or children in your charitable giving
- Want to be actively involved in your philanthropy with the option of supporting various programs at YSU or the YSU Foundation and also give to multiple Mahoning Valley non-profit organizations throughout the year

QUICK FACTS

- An efficient, flexible giving solution that allows you to operate on your own timetable
- Minimum to establish: \$10,000
- Strategic investment options with our diversified, actively managed portfolio

BENEFITS AND ADVANTAGES:

- We handle paperwork for your fund, including fund statements, distributions, and tax receipts for the fund donors' records
- You may receive a tax deduction at the time the fund is established, and will have no need to file any annual correspondence with the IRS.
- Your funds will be held by the Community Foundation of the Mahoning Valley and would be a part of a diversified, actively managed investment portfolio. Each fund is supported by professional investment managers and reviewed by an objective investment consultant. The Community Foundation's Investment Committee, which consists of board members and other professionals with experience in the financial field, develops investment policies for all funds and meets quarterly to evaluate fund performance.
- The YSU Foundation staff and the staff of the Community Foundation of the Mahoning Valley are current in the needs and initiatives at YSU and in the community and are always ready to answer any questions you might have.

MINIMUMS AND FEES:

The minimum balance to open and make distributions from a Donor Advised Fund is \$10,000, and the minimum allowable dispersement from the DAF is \$100. For endowed funds, the Community Foundation also offer an "Acorn Plan" that allows donors to start with a lesser amount with the plan to develop the balance of the fund to \$10,000 within 5 years.

As a component fund of the Community Foundation of the Mahoning Valley, you share collectively in the administrative maintenance of the Community Foundation. Your fund will be charged a 1% annual administrative fee, payable quarterly. Expendable funds are assessed an additional fee. The Community Foundation partners with local investment companies and bank trust departments for investment management, and an annual investment management fee is also assessed.



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