

# What does a better Bay Area look like to you?

THE  
SAN  
FRANCISCO  
FOUNDATION

## BRING YOUR VISION TO LIFE

No matter what your vision is for charitable giving, The San Francisco Foundation can fulfill your desire to give back and build a better Bay Area for today—and for future generations.



## YOUR PARTNER IN PHILANTHROPY

### Local Expertise

For more than 65 years, we have partnered with donors to fulfill their charitable giving goals by identifying the Bay Area's best and brightest changemakers. You get access to our program officers' expert guidance on nonprofits creating the greatest impact in the issues you care about.

### Exceptional Performance

Donors' assets are invested alongside The San Francisco Foundation's \$1.2 billion in assets, giving access to top-performing investment managers. Our investment performance is consistently at the top of the field, allowing charitable dollars to grow and make more impact.

### Personalized Service

Partnering with The San Francisco Foundation gives you the flexibility to be as involved as you want to be. Our team can help develop and execute a giving plan based on your interests, from identifying nonprofits to setting up site visits.

## ABOUT THE SAN FRANCISCO FOUNDATION

We are a leading agent of Bay Area philanthropy, with a network of donors and partners that share our commitment to the region. We address community needs by investing in people, organizations, neighborhoods, and policy. Over the past ten years we have granted \$800 million to continue our mission of building a better Bay Area. Our generous donors and our focused, long-term investment strategy have grown \$1.2 billion in assets – ranking the Foundation among the nation's largest community foundations in grantmaking and assets. The San Francisco Foundation serves San Francisco, Alameda, Contra Costa, Marin, and San Mateo Counties.

Join us.



sff.org

# Donor Advised Fund

## Charitable giving made easy.

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### FUND FEATURES

- Easy to establish and manage
- Immediate tax benefits
- 24/7 online access to manage your fund
- No administrative or reporting requirements
- Support charities anywhere, any time in the Bay Area, U.S., or abroad
- Access to complete records of donations and grants
- Family members can be named as successor advisors, allowing them to recommend grants
- May be established in your name, the name of a loved one, or anonymously
- Contributions of cash, stocks, bonds, mutual funds, closely held securities, certain private and restricted securities, real estate, and more are accepted

### TERMS SNAPSHOT

Minimum initial contribution: \$10,000

Minimum grant amount: \$250

No pay-out requirement

### ANNUAL FEES

\$0 - \$3 million: 1.00%

\$3 - \$10 million: 0.75%

\$10 - \$25 million: 0.50%

Over \$25 million: 0.25%

Minimum fee: \$500

Your fees support The San Francisco Foundation's charitable activities.

### GET STARTED TODAY

You can establish a donor advised fund today by completing a simple fund agreement and making a charitable contribution of at least \$10,000. You'll receive an immediate charitable tax deduction and can start making grants right away.



We specialize in handling complex assets and finding the best charitable giving solution for you.

Contact our Development and Donor Services team at [415.733.8500](tel:415.733.8500) or [donorservices@sff.org](mailto:donorservices@sff.org).