

Opening a donor advised fund at the Rancho Santa Fe Foundation could not be simpler.

1. Decide how you wish to open your donor advised fund. The Foundation accepts cash, appreciated securities, closely held stock, credit cards and other instruments such as charitable remainder trusts, charitable unitrusts, life insurance and many others. Our professional staff can discuss these options with you.
2. Decide on a name for your fund. Typically, donors choose to place their names or the family name on the fund. But you are not limited to these choices. We recommend a name that best suits your philanthropic goals. Examples might include the Smith Family Fund, the John and Mary Smith Donor Advised Fund or a name that is meaningful to the family or the purpose of the fund.
3. Meet with our staff to sign the fund agreement documents and then your philanthropic partnership with the Foundation will begin.



“The Rancho Santa Fe Foundation has become a valuable resource for our family’s philanthropic planning. Through the two donor advised funds that we have established at the Foundation, we have been able to carry out our family’s mission without forming our own family foundation. The RSF Foundation has proven to be more efficient, cost effective and has eliminated all of our administrative burden.”

Don and Judy Oliphant

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The Foundation recommends that individuals seek professional guidance from their financial advisors, accountants and attorneys with regard to their charitable giving and estate planning.

Donor Advised Funds at Rancho Santa Fe Foundation



“We have been engaged in philanthropy for many years. We have taught our children and grandchildren the value of philanthropy in our lives and how we can help to care for the people who need it the most. Through our donor advised fund at the Rancho Santa Fe Foundation, we support charitable organizations in the San Diego area and in the community in which most of our family lives.”

Bob and Sherrill Baker



Rancho Santa Fe
FOUNDATION
PROMOTING PHILANTHROPY SINCE 1981

*Building community by
promoting philanthropy*



Rancho Santa Fe
FOUNDATION
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Which option is the best one for you?

A donor advised fund at the Rancho Santa Fe Foundation allows you the flexibility to recommend distributions from your fund to the non-profit organizations of your choice. Donor advised funds are an ideal vehicle to maximize tax benefits from charitable donations.

Why establish a donor advised fund with the Rancho Santa Fe Foundation?

- **Receive tax deductions** for contributions to your fund
- **No capital gains taxes** on contributed assets
- **All administrative tasks** and filings are minimized or eliminated
- **Gain knowledge** about charitable organizations and their needs
- **Available** to help you identify and attain the results you are seeking
- **Proven track record** of successful investment of charitable assets
- **Recommend grants** with a two-day turn around
- **Maintain personal “name”** on grants
- **Maintain anonymity**, if desired
- **Meet others** with similar philanthropic interests

We suggest that you compare the options available to you and your family. Although many of the advantages are common to all three options, a donor advised fund at the Rancho Santa Fe Foundation is the best option if you wish to avail yourself of our knowledge of local and global needs... we are your philanthropic partner.

 Rancho Santa Fe Foundation			
Is a donor able to:	Donor Advised Fund	Private/Family Foundation	Commercial Donor Advised Fund
Create a family legacy	Yes	Yes	Yes
Pass responsibility to next generation	Yes—May designate successor advisors	Yes	Yes
Create a permanent endowment	Yes—may be stipulated in fund agreements	Yes	No—it serves as check writing service
Make charitable grants	Yes—to qualified 501(c)(3) organizations	Yes	Yes
Avoid administrative expenses	Administrative fee charged by Foundation	Board makes decision regarding overhead	Administrative fee charges by fund
Avoid un-solicited grant requests	Yes	Not necessarily	No
Create entity with less than \$1 million	Yes—minimum fund amount is \$20,000	Yes—but may not make financial sense	Yes
Make grants to individuals	Yes—through scholarships to college or university	Yes—as part of expenditure responsibility	No
Realize deduction for FMV* of publicly traded stock	Yes	Yes	Yes
Realize deduction for FMV* of other property	Yes—but not personal property unless there is a related use	No	No
Avoid set-up costs	Yes—there is no set-up fee	No	Yes—they are minimal
Avoid administrative tasks and expense	Yes—all administrative back-office handled by Foundation	No	Yes
Avoid filing tax returns	Yes—returns are filed by Foundation	No	Yes
Avoid minimum 5% annual distribution	Yes—there are no minimum annual requirements	No	Yes
Avoid 2% tax on net investment income	Yes	No	Yes
Partner with others who are resource for philanthropy	Yes—Foundation is charitable partner	Maybe	Possibly
Have maximum control of assets	No—but donor may recommend grants	Yes	No—donor may recommend grants
Have control of investment of assets	No—Foundation manages investment of assets	Yes	Some
Have legal control of assets	No	Yes	No
Maintain interest in family business	In very limited situations	In very limited situations	No
Employ a family member as Executive Director	No	Yes—if family does not constitute a majority	No
Create tradition of family philanthropy	Yes	Yes	Yes

* Fair Market Value