

The Community Foundation Advantage: A Donor-Advised Fund Comparison

	Capital Region Community Foundation	Commercial DAF providers
Charitable tax deduction	60% of AGI for cash 30% of AGI for appreciated assets	60% of AGI for cash 30% of AGI for appreciated assets
Charitable fund types	Offers a variety of flexible fund types: donor-advised, designated, field of interest, legacy, and more. All funds can be endowed if desired.	Donor-Advised Fund
Gifts accepted	Accepts most types of financial assets, including appreciated stock and real estate	Accept most types of financial assets
Fees	Competitive administrative fees cover costs of processing transactions and robust donor support. Ultimately, fees support our mission and invest in our community.	Administrative fees cover costs of processing transactions
Access to resources	Online resources and annual events for donors. Informs donors about community needs and impactful grantmaking opportunities.	Online resources
Personalized services and local knowledge	Professional staff offer personalized giving advice and fund management services. Expertly connects donors to local nonprofits ensuring the most rewarding and impactful ways to give.	Limited knowledge of community issues and limited personalized service
Set-up Options	Quick and easy online application or in-person meeting	Online application only
Legacy planning	Helps donors develop a custom legacy plan to ensure wishes are properly documented and fulfilled. Provides fund succession guidance.	Designate successor advisor or charities



**COMMUNITY
FOUNDATION**

Capital Region Community Foundation

Why Community Foundation DAFs are the superior option:

- Personalized donor support
- Extensive knowledge of community needs and local nonprofits
- Administration fees support the local community
- No minimum retained balance required

