

# Donor Advised Funds

## Your Guide to Giving

**ACCESS YOUR DONOR PORTAL:** Your go-to resource on our website for all your donor needs: [NapaValleyCF.org/FundHolder-Services](https://NapaValleyCF.org/FundHolder-Services)

### How to Initiate a Grant

To recommend a grant distribution from your Donor Advised Fund (DAF), you have **3 OPTIONS**:

- 1) DONOR PORTAL:** Log into your secure Donor Portal and complete the Grant Recommendation Form there and submit OR
- 2) EMAIL:** Fill out a Grant Recommendation Form online (scroll down for the link). You will be asked to confirm your email address, then a copy will be sent to us OR
- 3) MAIL:** Download a printable Grant Recommendation Form that you complete and mail to us.

Please make sure to fill out the “Grant Recipient” section and “Grant Amount and Purpose” section:

- Organization’s official name
- Amount
- Charitable purpose fields

**SIGN** (or e-sign) and date where it says “Signature of Fund Advisor”

**SEND** Click through to form to “submit” your signature, OR email OR snail mail the completed form to the Foundation.

### How to Fund Your Fund:

Cash, publicly-traded stocks, bonds, and mutual funds can be contributed to your DAF and are eligible for an immediate tax deduction. Gifts of real estate and non-publicly traded assets may also be used, subject to approval.

Qualified charitable distributions from an IRA during your lifetime cannot be donated to a DAF at this time, per IRS regulations.

**1) CHECK:** Send a check to Napa Valley Community Foundation: 3299 Claremont Way, Suite 4, Napa, CA 94558. **Include the name of your Fund.**

**2) CREDIT OR DEBIT CARD:** Transactions can be done **securely online at:**

<https://DonateNow.NetworkForGood.org/NVCF>

**PUT THE NAME OF YOUR FUND** in the bottom box on the form that says “I want my donation to be dedicated:”

**3) SECURITIES:** A transfer form and instructions can be found online at: [NapaValleyCF.org/forms-pubs](https://NapaValleyCF.org/forms-pubs) and scroll down to “I’m a Giver”

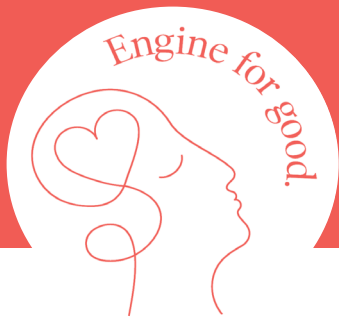
**4) CASH:** Wire transfers can be done by emailing [Hello@NapaValleyCF.org](mailto:Hello@NapaValleyCF.org) for instructions.

### How long does it take to process a grant?

**If the grant is \$100,000 or less:** It takes the Foundation about 7-10 business days to process a grant recommendation form. If it takes longer than usual, we will let you know!

**If the grant is more than \$100,000:** It will need to be approved by the Executive Committee. The Executive Committee reviews grants for approval monthly. You will be notified by email when your grant is distributed.

**Grant payments are issued once per week as physical checks or electronic payments via ACH Transfer.**



# Donor Advised Funds

## Your Guide to Giving: Q & A

### What kind of organizations may I recommend for grants?

You may recommend 501(c)(3) public charities, faith-based organizations, schools, or government entities/programs. You may also recommend a grant to a charitable program that operates under the fiscal sponsorship of an established 501(c)(3) public charity.

### What is the minimum grant amount? \$250.00

### Is there a maximum grant amount?

No maximum amount, but grants greater than \$100,000 need approval by the Executive Committee before they can be sent out.

### How many grants can I recommend in a year?

There is no limit to the number of grants you can recommend in a year.

### What is the minimum balance that I need to maintain?

To maintain an active DAF, you must keep a minimum balance of \$500 in your Fund at all times.

### Are there certain kinds of grants that are not permitted? By law, DAF grants cannot be used to:

1. Fulfill a legally binding pledge or other financial obligation to a nonprofit or charitable program.
2. Benefit you, any specific individual or benefit an entity in which you hold 35% or more controlling interest (this includes payments to a university for a scholarship for a particular student, emergency hardship grants or disaster relief grants) .
3. Support political campaigns or lobbying activities.
4. Pay for membership benefits, raffle tickets, event tickets (galas or fundraisers, sporting events, performances), goods bought at charity auctions, tuition, religious benefits, etc.
5. Provide financial or business benefits to you or a related party.

### Can I make an anonymous grant from my Fund?

Yes you can! You may also recommend a grant in someone's honor or memory.

### How will I know my grant recommendation has been received?

We will send you a confirmation email once we have received and reviewed your grant recommendation.

### How will I know that my grant has been mailed to the organization?

We will send you a confirmation email once we have mailed your grant recommendation.

### Who should I contact if I am having a problem with the Donor Portal?

[GrantsAdmin@NapaValleyCF.org](mailto:GrantsAdmin@NapaValleyCF.org) or (707) 254-9565 x18

### May I speak to someone at the Foundation about funding opportunities and my philanthropic interests?

Yes. We are always eager to better understand the kinds of charitable programs that you would like to support. Please contact us at [GrantsAdmin@NapaValleyCF.org](mailto:GrantsAdmin@NapaValleyCF.org)

### Can I make grant recommendations to international charities?

You may recommend a grant to an American-based charity that works overseas. There are also intermediary charities based in the U.S. that you may be able to recommend grants to that will, in turn, make a grant to your preferred organization for an additional fee. **However, you cannot make a direct grant to a charity that is not IRS-qualified as a 501(c)(3) nonprofit organization in the US.**

### How often can I make contributions to my Fund?

You may make a contribution at any time. Many donors like to add to their DAF accounts immediately after they recommend a grant. Others prefer to make regular contributions and build up the account for future grantmaking.

**More Questions?** We love questions and are always here to help!

EMAIL: [GrantsAdmin@NapaValleyCF.org](mailto:GrantsAdmin@NapaValleyCF.org)

PHONE: 707.254.9565