

# Donor Advised Funds

## HOW IT WORKS



### GIVE

Thank you for choosing to establish a fund at NVCF. Your generosity helps create meaningful change in our community.

### GROW

Your Fund is thoughtfully invested to align with your philanthropic goals. You and your loved ones can add to your Fund at any time.

### GRANT

Recommend grants from your Fund to support the causes you're passionate about and make a real difference in our community and beyond.

## HOW TO FUND YOUR FUND

Cash, publicly-traded stocks, bonds, and mutual funds can be contributed to your Donor Advised Fund (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.

#### Check:

Send to: Napa Valley  
Community Foundation  
3299 Claremont Way,  
Suite 4, Napa, CA 94558.  
*Include your Fund name!*

#### Credit/Debit Card:

Donate securely online:  
[bit.ly/NVCFdonate](https://bit.ly/NVCFdonate)  
*Enter your Fund name in  
the box reading "Honor or  
remember someone with  
your gift"*

#### Securities:

Download the transfer  
form and instructions:  
[bit.ly/NVCFforms](https://bit.ly/NVCFforms)  
*Scroll down to "I'm a Giver"*

#### Cash:

Wire transfers can be  
done by emailing  
[giving@napavalleycf.org](mailto:giving@napavalleycf.org)  
for instructions.

*\*Qualified Charitable Distributions from an IRA during your lifetime cannot be donated to a DAF, per IRS regulations.*

# HOW TO INITIATE A GRANT



## Via Donor Portal:

Log into your secure Donor Portal (GOfund) and complete the Grant Recommendation Form

[gofund.akoyago.com/napavalleycf](https://gofund.akoyago.com/napavalleycf)



## Via Email:

Fill out our [Grant Recommendation Form](#). Confirm your email address to submit.

[bit.ly/makeagrant](https://bit.ly/makeagrant)



## Via Mail:

Download a [printable Grant Recommendation Form](#) that you complete and mail to us.

[bit.ly/NVCFgrant](https://bit.ly/NVCFgrant)

*Please make sure to fill in the required information: the organization's name, the grant amount, and the purpose of the grant. Then, sign (or e-sign) the form and submit it via the Donor Portal, email, or postal mail.*

## FAQ

### How Long Does it Take to Process a Grant?

- **Grants \$100,000 or Less:** Processing takes 7-10 business days. We'll notify you if delays occur.
- **Grants Over \$100,000:** Require Board approval, may take up to 14 business days to process.

Payments are issued weekly via check/ACH transfer. We'll send an email once the grant has processed.

### What Organizations are Eligible?

- 501(c)(3) public charities, faith-based organizations, schools, or government entities/programs.
- Charitable programs operating under the fiscal sponsorship of an established 501(c)(3) public charity.

### Minimum and Maximum Grant Amounts?

**Minimum:** \$250. **Maximum:** None.

### Is there a Minimum Fund Balance?

To maintain an active DAF, a minimum Fund balance of **\$500** is required at all times.

### Can you help with funding ideas?

Of course! Our team is happy to suggest programs/organizations that match your philanthropic interests; please reach out to us anytime.

### Are any Kinds of Grants Not Permitted?

By law, DAF grants **cannot be used to:**

- Fulfill existing pledges or financial obligations.
- Benefit any specific individual, including scholarships for particular students or hardship grants.
- Support political campaigns or lobbying.
- Receive goods or services, including membership benefits, raffle/event tickets, auction items, tuition, religious benefits, etc.
- Provide financial or business benefits to you or a related party.

### Can I Make Anonymous Grants?

**Yes**, grants can be made anonymously or in honor/memory of someone.

### Can I Make International Grants?

You cannot make a direct grant to a charity that is not IRS-qualified as a 501(c)(3) nonprofit organization in the US, however:

- You may recommend grants to U.S.-based charities working 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.

