



Donor-Advised Funds at the Orange Catholic Foundation

Family Philanthropy for the Faithful of Orange

Did you know . . .

- The Donor-Advised Fund has been in use since the 1930s, increased in popularity in the 1990s, and today is the fastest-growing tool for managing individual philanthropy
- Donor-Advised Funds are a more efficient and less expensive way of managing family philanthropy when compared to the cost of operating a private family foundation
- A Donor-Advised Fund provides structured philanthropy that encourages future generations to remain involved in the founder's charitable goals

What is a Donor-Advised Fund?

A Donor-Advised Fund ("DAF") is an investment account that supports an individual's charitable giving over time. You fund your DAF by irrevocably gifting cash or other approved assets to OCF. The money is invested, and anytime thereafter you, as the DAF's adviser (or whomever you designate) may recommend cash disbursements from the DAF be made to parishes, schools and ministries in the Diocese of Orange you select.

What entities are eligible to receive grants from DAFs held at OCF?

In order to be eligible for a grant from an OCF fund, an organization must be a parish, school, ministry or selected special fund all for the benefit of the Diocese of Orange.

Advantages of a Donor-Advised Fund at OCF

- You name your fund and designate your advisers, successor advisers, and fund purpose
- You receive an immediate tax deduction as allowable by the Internal Revenue Service for contributions made to your fund
- Your fund is invested and grows tax-free
- You decide when to request grants from your fund to qualified entities
- You may contribute certain noncash assets at fair market value
- You receive flexible, personal, and convenient fund administration through our professional office staff
- You can easily involve your family to create a legacy of faith-based philanthropy
- Your funds and grants are administered in alignment with Catholic values

How does OCF help engage multiple generations in Catholic philanthropy?

The Orange Catholic Foundation encourages all families to engage in meaningful discussion to clearly identify and share the values that define their philanthropy. Those conversations help pass the tradition of giving on to the next generation.

- **Appointing Successor Advisers**

Donor-Advised Funds at OCF allow the founding donor to name up to three generations of successor advisers—meaning that your children, grandchildren, and even great-grandchildren can continue granting in line with the purpose of your fund for generations after you are gone.

- **Engaging in the Faith**

All clients receive OCF e-newsletters and print publications, which highlight the many ways that giving is an expression of our Catholic faith.

Establishing a Fund at OCF

A fund can be set up quickly and easily by contacting our office. We will guide you through the simple fund agreement and explain your investment options.

Growing your charitable investment

The Orange Catholic Foundation offers investment options to accommodate short-, medium-, and long-term charitable goals. Each portfolio is carefully chosen and maintained to reflect Catholic values and offer performance relative to each investment option's stated objective.

Grow your fund through additional contributions in your lifetime and by designating your fund as a beneficiary of your IRA or trust in your estate-planning documents. Please call us for more information about our Gift Acceptance Policy.

Granting

Fund Advisers may recommend grants to entities under the leadership of the Diocese of Orange. Grants may not be made to private foundations, individuals or entities not affiliated with the Diocese of Orange.

Considerations and Administrative Fees for Donor-Advised Funds at OCF

Minimum Initial Contribution	\$10,000			
Minimum Grant Amount	\$250			
Minimum Account Balance	\$5,000			
Annual Administrative Fee <i>assessed quarterly</i>		Up to \$1M	\$1M–\$5M	Over \$5M
	Permanent Fund	1.25%	0.75%	0.50%
	Nonpermanent Fund	2.00%	1.50%	1.00%

OCF funds are typically invested in marketable securities; manager fees are charged as a pass-through to your account with full disclosure. We reserve the right to charge additional fees for extraordinary or special services.

About the Orange Catholic Foundation

The Orange Catholic Foundation is a 501 (c)(3) charitable corporation that exists to serve the Catholic community of Orange County. As a foundation for Catholics, we assist families and individuals to leave a legacy uniquely aligned with their Catholic values and beliefs. The Foundation’s primary function is to raise funds through planned giving and various fundraising programs and special annual events. In addition, the Foundation manages endowments and a variety of funds. The Foundation works with donors to customize their charitable intentions and then grants funds according to the fund agreement and donor intent.

Our Mission

We are an autonomous, pious foundation that works in collaboration with members of our Diocese of Orange to raise, manage, grow and grant funds supporting all aspects of the Catholic faith following each donor’s intent.

Our Goal

Through the inspiration of the Holy Spirit, the Orange Catholic Foundation strives to become a premier, nationally-recognized steward of Catholic philanthropy in carrying out Christ’s work to sustain and enhance all aspects of Catholic life for the entire community in the Diocese of Orange.

Our Services

- Donor-Advised Funds to maximize charitable impact and simplify your giving
- Endowments to benefit specific entities or programs with perpetual support
- Scholarships to support Catholic education
- Custom funds to help you achieve your unique philanthropic goals

LEGAL DISCLOSURE

The information provided is general and educational in nature. It should not be construed as legal or tax advice; you should consult your tax adviser to properly determine the tax consequences of making a charitable gift to the Orange Catholic Foundation, a registered public charity under sections 501(c)(3) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Contributions to the Orange Catholic Foundation represent irrevocable gifts subject to the legal and fiduciary control of the foundation’s Board of Directors.

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