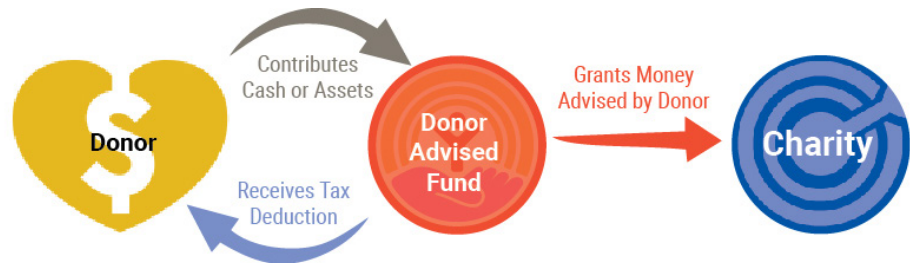


THE UNITED WAY of the MID-WILLAMETTE VALLEY DONOR ADVISED FUND



What Is a Donor Advised Fund?

- “Charitable investment fund”
- Donor contributes to a fund owned by a qualified 501(c)(3) nonprofit organization
- Assets are invested by a financial advisor
- Donor may recommend grant disbursements from the account to other nonprofit organizations

How Our Fund Works

- Donor contributes minimum \$5,000 to create a Donor Advised Fund
- Assets are owned by United Way of the Mid-Willamette Valley and managed by a financial advisor
- Donor retains an advisory role and may recommend grant disbursements for charitable purposes

The Acorn Fund

- Charitable fund that builds to become a Donor Advised Fund
- Accessible to more donors, only \$1,000 initial minimum contribution
- Donor continues to contribute to the fund until it reaches \$5,000
- Converts to a Donor Advised Fund and can begin to recommend grant disbursements

Benefits to the Donor

- Immediate tax write-off at the time assets are donated to the fund
- Can donate cash, stock, or other appreciated assets
- Flexibility to recommend grants to different organizations and causes
- Philanthropy stays local, account owned by United Way and managed by local financial advisors
- Anonymity – if desired, name of the donor can be kept confidential from grant recipients
- Legacy options: the fund can exist in perpetuity

Benefits to the Financial Advisor

- A new service to offer clients
- Assets remain under management of the financial advisor
- Partnering with the community to build a stronger future

Benefits to United Way

- Donor-centric – responding to donors’ giving preferences
- Flexibility to address different causes
- Building long-term sustainability of local philanthropy

*DISCLAIMER: Policies and procedures subject to change at the discretion of the United Way of the Mid-Willamette Valley Board of Directors

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