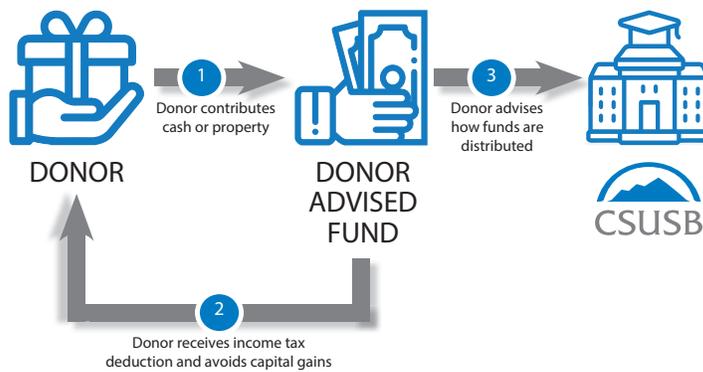




**DONOR
ADVISED FUND**
GIFT GUIDE


CALIFORNIA STATE UNIVERSITY
SAN BERNARDINO
Planned Giving

WHAT IS A DONOR ADVISED FUND?



A donor advised fund enables a donor to give to CSUSB over time. The fund is established with CSUSB and, after a donor contributes to the fund, the donor can make charitable gifts directly from the fund each year. The donor is entitled to take a deduction in the year contributions are made to the fund.

CONSIDERING A DONOR ADVISED FUND

Are you looking for a simple, flexible tool that allows you to manage and maximize your giving toward support of the causes that matter most to you? Would you like to make a single, significant gift to support multiple organizations? Are you interested in a way to simplify your annual and lifetime charitable giving? A donor advised fund may be a great option.

HOW DOES A DONOR ADVISED FUND WORK?

A donor advised fund is your own charitable fund, named after you and administered by CSUSB. You can make contributions to your fund, which we will invest to benefit the causes you care most about. Once your fund is created, you can advise us to make grants from your fund to support the work of your favorite programs and areas here at CSUSB.

HOW DO YOU SET UP A DONOR ADVISED FUND?

A donor advised fund is easy to create with a few simple steps:

[Complete our simple donor advised fund application.](#)

Please contact us for a copy of the application.

[Make an initial gift with cash or an appreciated asset to fund a donor advised fund at CSUSB.](#)

The assets in your donor advised fund will grow tax-free and earn interest.

[Support the causes you care about.](#)

Make grant recommendations from your donor advised fund.

[Pass on the oversight to the ones you love.](#)

When you pass away, your heirs can continue to recommend charitable grants from your donor advised fund.

HOW CAN A DONOR ADVISED FUND BENEFIT YOU?

WHAT ARE THE BENEFITS OF A DONOR ADVISED FUND?

There are a number of benefits to creating a donor advised fund. Here are just a few to consider:

Deductibility. You may be entitled to take an immediate income tax deduction each time you make a gift. Contributions of appreciated capital assets avoid capital gains taxes.

Flexibility. You can give when and where you want. Take your time deciding how to designate your giving. There is no deadline for making distributions.

Simplicity. A donor advised fund is easy to set up and helps you avoid the extensive bookkeeping and check-writing that is often involved in charitable giving.

Versatility. You can make gifts to your donor advised fund using cash, appreciated securities, and a variety of other assets.

Multiplicity. You can make a gift of one large asset to fund multiple charitable interests.

Privacy. You can designate your grants anonymously if you wish.

Family. You can engage your family in the journey and joy of generosity.

Legacy. You can ensure that your legacy continues on by leaving instructions with your heirs directing them to give. Giving from your donor advised fund through your estate can also simplify your charitable estate bequests.

DONOR ADVISED FUNDS VS. FOUNDATIONS

A DONOR ADVISED FUND CAN PROVIDE YOU WITH A NUMBER OF ADVANTAGES

A donor advised fund has several advantages when compared to a private foundation. The start-up time and costs are minimal for donor advised funds, and gifts to these funds are generally deductible at fair market value. In addition, a donor advised fund is not subject to the distribution requirements and certain excise taxes faced by private foundations.

ONE GIFT, A LIFETIME INVESTMENT.

The gift that keeps on giving.

If you have decided to make a gift to CSUSB through a donor advised fund, please let us know. We would love to work with you and your advisor to discuss how this type of gift can benefit you. To start the process or ask any questions you might have, please contact our Office of Planned Giving today.







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