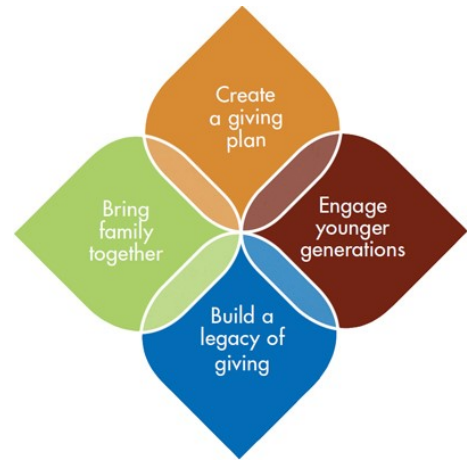


Donor Advised Funds Summary For Donors

Achieve your charitable goals while helping *your community*



Why HCF?

- Independent - not part of for-profit financial institution
- Fees stay in the community supporting local programs
- Concierge-level service – not a call center
- Donor's FA manages investments at all levels on FA's familiar platform
- Experienced with advised-managed DAFs – longest in industry
- 15th Year Anniversary - 2015

Advantages

- Simple and quick set-up - \$2,500 minimum
- Creates a lasting legacy of giving
- Immediate and maximum tax benefits
- Grant decision separated from tax decision
- Option for privacy or recognition
- Donor makes grants on his/her convenient timetable

Typical Donor Scenarios

A Donor Advised Fund can be a solution if you are:

- giving now through checkbook but have appreciated assets.
- planning sale of a business or other liquidity event
- desiring to create a Legacy for which to be remembered.
- not being comfortable with cost, regulatory hassles and lack of privacy in their Private Foundation.
- wanting more flexibility or control; assets gifted, investment strategies, succession planning, and granting.
- experiencing an extraordinarily high income year.
- approaching retirement.
- struggling with ways to minimize taxes on the sale of appreciated assets.
- questioning how best to support several charities over a number of years through one gift.
- wanting to engage children/grandchildren.
- wanting to simplify gifts to more than one charity.
- having fluctuating income vs the desire for steady level of giving.
- having concerns that a large grant may overwhelm their favorite charity.
- wanting flexibility to change charitable beneficiaries over time.

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