TOGETHER, WE TRANSFORM GENEROSITY INTO MEASURABLE IMPACT.

OCF puts donated money to work for Oregonians - $100 million in grants and scholarships annually. Since 1973, OCF grantmaking, research, advocacy and community-advised solutions have helped individuals, families, businesses and organizations create charitable funds to improve lives for all Oregonians.
What is a Donor Advised Fund?

A donor advised fund allows you to make a charitable contribution, qualify for an immediate tax benefit and then recommend grants to nonprofits from your fund over time.

When you have an OCF advised fund you are free to spend your time being thoughtful about your giving. The administrative and investment responsibilities of a private foundation – or of tracking your annual “checkbook giving” – are replaced with the expertise and efficiency of OCF staff and grantmaking systems. Plus, you receive personalized service to ensure that you have a great experience with your giving.

“We can guide the direction of our donations, making those decisions with the foundation annually. That’s what’s unique about OCF.”

DUNCAN CAMPBELL
DONOR
How Your Advised Fund Works

You establish and name your fund by creating a fund agreement, with the assistance of OCF.

- You make a gift of cash or other assets to OCF to start your fund.
- You may be eligible to receive an immediate tax deduction for your charitable contribution.
- Your fund is expertly invested.
- You recommend grants from your fund that are promptly reviewed and acted upon.
- You may add to your fund at any time, including through your estate.
- Your philanthropy is supported by OCF staff with strong statewide knowledge and ability to connect you to nonprofits and other donors who care about the same issues as you.
Benefits of an OCF Advised Fund
At OCF, you benefit from services that help you make effective grants.

**PERSONAL SERVICE**
Your staff team works with you to increase the impact of your grantmaking, keep you informed about your fund and the Foundation, and assist you in adding to your fund now or through your estate.

**INVESTMENT EXPERTISE**
Your contributions to your OCF fund are stewarded by our expert investment committee and professional managers to ensure the longevity and growth of your fund.

**DIRECT PARTICIPATION**
You recommend organizations you’d like to support. Upon approval of the OCF board of directors, the grants are made in your fund’s name.

**ENSURED LEGACY**
Your permanent OCF fund can create a lasting legacy. You may name successor advisors for your fund. You also get to define how your fund will be used after you and your family are no longer advisors.
Learning Opportunities for Advised Fund Donors

- Visit a nonprofit organization in which you have an interest
- Learn the fundamentals of grantmaking
- Attend OCF-hosted events where you can meet other OCF donors and learn about critical issues regionally and statewide
- Consult OCF staff for advice about specific grantmaking strategies
- Learn about linking your fund to your estate plan so you can make a charitable gift through your will or trust
- Develop a family philanthropy program

For an up-to-date list of events and learning opportunities, visit: OREGONCF.ORG
WHAT IS THE MINIMUM CONTRIBUTION NEEDED TO SET UP A DONOR ADVISED FUND?
Your fund can be set up with a contribution of at least $25,000, or you can grow your fund over time with a minimum donation of $5,000.

HOW DO I RECOMMEND GRANTS FROM MY ADVISED FUND?
You may recommend grants throughout the year, either online through MyOCF or by email, letter or a personal meeting with OCF staff.

IS THERE A MINIMUM GRANT AMOUNT?
Individual grant recommendations of $1,000 or more are strongly preferred. The minimum grant amount is $500.

HOW OFTEN CAN I CONTRIBUTE TO MY ADVISED FUND?
You can make a donation to your fund at any time.

MAY I RECOMMEND A GRANT TO AN ORGANIZATION OUTSIDE OF OREGON?
Yes. You may recommend a grant to any qualified nonprofit within the United States. We do request that, over the lifetime of the fund, at least 50 percent of your giving goes to Oregon nonprofits.

MAY I RECOMMEND A GRANT TO AN ORGANIZATION OUTSIDE THE UNITED STATES?
International grants can be made when an organization has nonprofit status in the U.S.

MAY I RECOMMEND A GRANT TO AN INDIVIDUAL?
No. According to IRS regulations, community foundations may make grants only to qualified nonprofits, public charities, religious institutions or government entities.

CAN I FULFILL A PLEDGE THROUGH MY ADVISED FUND OR RECEIVE ANY BENEFIT AS A RESULT OF MY GRANT?
No. In compliance with federal regulations, personal pledges may not be fulfilled with grants from your fund, nor can you receive any benefits.

CAN I REMAIN ANONYMOUS TO A GRANT RECIPIENT?
Yes. Anonymity can be accommodated on an ongoing or a grant-by-grant basis.

WHAT IS THE FEE FOR ADMINISTERING MY FUND?
OCF assesses each donor advised fund an annual administrative fee of at least $475, but in all cases the fee is less than one percent.

HOW MUCH CAN I GRANT EACH YEAR?
To maintain the purchasing power of each fund, the OCF board of directors annually determines a percentage payout rate for grantmaking. OCF’s current payout rate is between 4 and 5 percent, based upon a 13 quarter trailing average of fund market values.
The mission of Oregon Community Foundation is to improve lives for all Oregonians through the power of philanthropy.

OCF works with individuals, families, businesses and organizations to create charitable funds to support the community causes they care about.

Get Started

CALL
YOUR LOCAL OCF OFFICE

BEND
(541) 382-1170

EUGENE
(541) 431-7099

MEDFORD
(541) 773-8987

PORTLAND
(503) 227-6846

SALEM
(503) 779-1927

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