



The Dayton Foundation  
We help you help others.

The Regional Community Foundation

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Please note: The Dayton Foundation does not practice law or offer financial or tax advice. The Foundation recommends that people considering establishing funds or legacies through the Foundation consult their financial, tax or legal advisor.



Confirmed in Compliance with National Standards for U.S. Community Foundations



We help you help others.<sup>SM</sup>

## How to Make the Most of Your Charitable Gifts



Since 1921, helping people to help others.

The Dayton Foundation can help, whether you:

- make annual charitable gifts or wish to establish a long-term fund to benefit charity,
- want to give now or through your estate,
- are of modest or wealthy means, or
- wish to support education, social services, art, nature, your community or place of worship, and more.

The Dayton Foundation is the region's leader in helping people find the best way to help others.

### What Is The Dayton Foundation?

The Dayton Foundation is a locally run, not-for-profit organization – 501 (c)(3) – created by and for the people in the Greater Dayton area. Our core purpose is to help you help others whether locally or around the world.

Since 1921, people from all walks of life have established charitable funds through the Foundation with a commitment to help today or after their passing through their estates.

We offer innovative giving vehicles, such as Charitable Checking Accounts,<sup>SM</sup> Donor-Advised Funds, Scholarship Funds and private foundation alternatives. Anyone can be a philanthropist even if you have a modest amount to give and want to help others.

Donors have turned to the Foundation for their charitable giving because we can:

- simplify the giving process anywhere in the United States and internationally,
- maximize tax benefits and minimize costs,

- add flexibility in giving, and
- offer added support from a staff knowledgeable about community issues and charitable vehicles.

The Dayton Foundation provides people with a vehicle for collective community good. We help you help others.<sup>SM</sup>

### How Can The Dayton Foundation Help You?

The Dayton Foundation can help you if you give to charity (or wish to leave

► MORE



*“The Dayton Foundation is a force for good in our community. It also is a very progressive community foundation. The Dayton Foundation was the best solution for our family’s giving.”*

– Don and Marcy Schade, Charitable Checking Account<sup>SM</sup> and Family Foundation Plus<sup>SM</sup> donors since 1989



a legacy) and want to make the most effective use of your charitable dollars. We work with annual givers and with those who wish to establish long-term (endowed) funds or planned and deferred gifts (including gifts that pay income for life).

### What Benefits Can You Expect When You Use The Dayton Foundation?

- Community knowledge and impact
- Professional staff, including CFRE-certified fundraising executives and donor services specialists, to help you and your advisors maximize your charitable dollars and do the most good



*“It’s reassuring to know that the Foundation has its ear to the ground and will have the flexibility to support the efforts with the greatest impact long after we’re gone.”*

– Jane Dunwoodie, Charitable Checking Account, SM designated and legacy fund donor since 1999

- Flexible and individualized service
- Record keeping through one organization to **simplify your charitable giving** to multiple charities
- Maximum tax advantages as a public charity
- Rigorous commitment to **stewardship** and donor intent, in perpetuity
- Highly rated fund management, with annual independent audits of all funds and third-party investment oversight
- Wide array of **giving methods** and ways of funding your gift, including checks, securities, retirement funds, real estate, bequests and more
- Availability of services offering better alternatives to private foun-

dations and assistance to people who have family members with disabilities

- Ability to give to any 501(c)(3) public charity locally, nationally and internationally
- Cost effectiveness
- Institutional stability, with a century of experience in charitable giving, planning and administration
- Secure, online access to your fund balance and giving history, as well as gift and grantmaking options
- Acknowledgment of your gifts or assurance of anonymity, as directed by you
- Being part of a philanthropic community of donors in which you



*“The Dayton Foundation is the most trusted organization in the Miami Valley. They have the expertise and experience to help people like me to do good in the world.”*

– Father Satish Joseph, founder of Mercy-Pets Fund, a Charitable Checking Account SM since 2017

can take pride and join with to make a collective impact upon our region

### How Can You Learn if The Dayton Foundation Is Right for You?

Call a member of The Dayton Foundation’s Development and Donor Services staff at (937) 222-0410 or toll free at (877) 222-0410, or visit [www.daytonfoundation.org](http://www.daytonfoundation.org) to read about available donor services, charitable options and how the Foundation can help you help others.



*“It’s important to help others and to contribute to the extent that you are able. The Dayton Foundation makes it easy for us to give.”*

– Veni and Soma Avva, MD, Charitable Checking Account, SM Field-of-Interest and IRA-Designated Fund donors since 1989



*“The Dayton Foundation and its African-American Community Fund are showing the community the inclusiveness of philanthropy, that it is not just for rich people, but for all of us at every giving level.”*

– Gladys Turner Finney, Donor-Advised and Scholarship Fund donor since 1998