



GREATER
TACOMA
COMMUNITY
FOUNDATION

GIVING VEHICLES



WHAT YOU CAN GIVE



Cash



Securities

Stocks, Bonds, Mutual
Funds, etc



Real Estate



IRA

IRA or Qualified
Retirement Plans



Cryptocurrency



**Business
Interests**

DONOR-ADVISED FUND

GOAL

Stay Involved

HOW IT WORKS

Donor-Advised Funds allow the donor (or a person(s) designated by the donor) to provide recommendations to GTCF on charitable distributions which can be made to a wide variety of grantees.

DONOR ROLE IN ESTABLISHING FUND

- Advisory Privileges
- Names Fund Advisors and Successor Advisors

ONGOING DONOR INVOLVEMENT

Yes

BENEFICIARY

501(c)3s recommended by Fund Advisor(s) on a grant-by-grant basis

ABILITY TO FUNDRAISE

Yes - only recommended in special circumstances.

STEPPED FEE

0.25%-1.25%

IDEAL OPTION FOR

An individual or family looking to have continued involvement in the charitable distribution from their fund.



DESIGNATED FUND

GOAL

Targeted Support

HOW IT WORKS

Designated Funds make grants to nonprofit organizations (up to 5) that the donor has designated in the fund agreement.

DONOR ROLE IN ESTABLISHING FUND

→ Identifies designee(s)

ONGOING DONOR INVOLVEMENT

Directed toward the relationship with the nonprofit.

BENEFICIARY

Nonprofit organization (501(c)3 or religious entity) as outlined in the fund agreement.

ABILITY TO FUNDRAISE

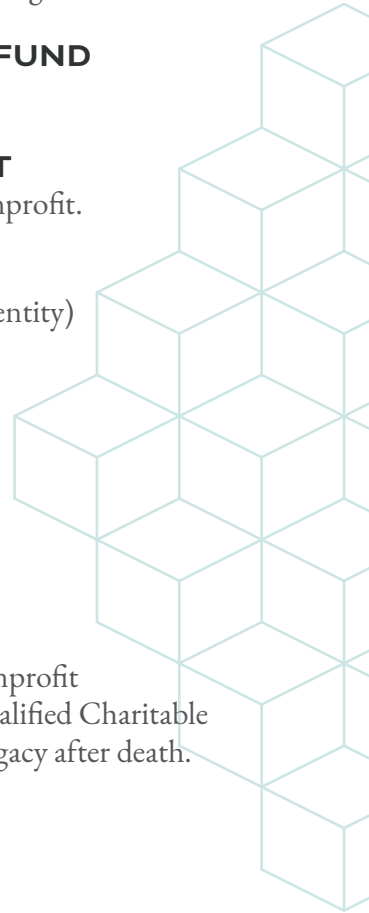
Yes

STEPPED FEE

0.25%-1.75%

IDEAL OPTION FOR

Someone interested in supporting specific nonprofit organizations during life, especially with a Qualified Charitable Distribution (QCD) and/or as part of their legacy after death.



DESIGNATED FOR CAPITAL

GOAL

Targeted support for a time-bound community movement.

HOW IT WORKS

Designated for Capital Funds provide fiscal support for community movements that help Pierce County thrive. Charitable gifts can be made to the fund and grants are made from the fund to pay for invoices and costs aligned with the designated charitable purpose.

ONGOING INVOLVEMENT

Movement lead(s) manages relationships with donors.

BENEFICIARY

Costs associated with the movement's charitable purpose as defined in the fund agreement.

ABILITY TO FUNDRAISE

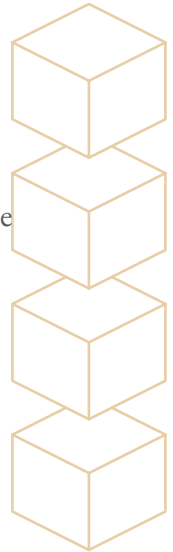
Yes. Raising funds is the primary purpose of this fund.

FEES

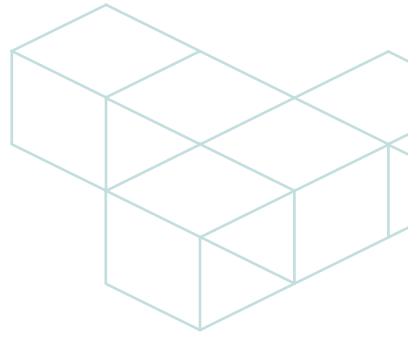
5% or as negotiated

IDEAL OPTION FOR

A time-bound endeavor that seeks the ability to accept charitable gifts (per IRS regulations) in support of the established charitable purpose.



EDUCATION ACCESS FUND



GOAL

Expanded Education Access

HOW IT WORKS

Establishing donor designates an Education Access Partner. Annual grants are then directed to a school district, university, or an education-focused nonprofit organization.

DONOR ROLE IN ESTABLISHING FUND

→ Identifies Education Access Partner

ONGOING DONOR INVOLVEMENT

Donor maintains relationship directly with Education Access Partner.

BENEFICIARY

Education Access Partner identified by establishing donor

ABILITY TO FUNDRAISE

Yes

STEPPED FEE

0.25%-1.75%

IDEAL OPTION FOR

Someone interested in supporting expanded education access that aligns with the needs of today's students.

AGENCY FUND

GOAL

Carry out Agency/Nonprofit's mission

HOW IT WORKS

Agency Funds are established when a 501(c)3 nonprofit organization (the "agency") transfers assets to GTCF to hold and invest. Gifts to the fund come only from the agency. Distributions from the fund are paid only to the agency upon the agency's request.

DONOR ROLE IN ESTABLISHING FUND

→ The Agency serves as both donor and beneficiary.

ONGOING DONOR INVOLVEMENT

Yes

BENEFICIARY

Agency/Nonprofit established in fund agreement

ABILITY TO FUNDRAISE

No. Contributions can only be accepted from the Agency.

STEPPED FEE

0.10%-1%

IDEAL OPTION FOR

Nonprofits looking to outsource the administration and investment management of their endowed or reserve funds.



FIELD OF INTEREST FUND

GOAL

Address issues and barriers

HOW IT WORKS

Field of Interest Funds make grants for purposes in a specific area of interest as determined by the donor at the time the fund is established. Once the fund is established, GTCF determines the most appropriate grants to support the charitable interest of the fund.

DONOR ROLE IN ESTABLISHING FUND

→ Defines field of interest when establishing fund.

ONGOING DONOR INVOLVEMENT

Donor involvement ceases once fund is established.

BENEFICIARY

Changes according to community need and promising practices within the specific field of interest.

ABILITY TO FUNDRAISE

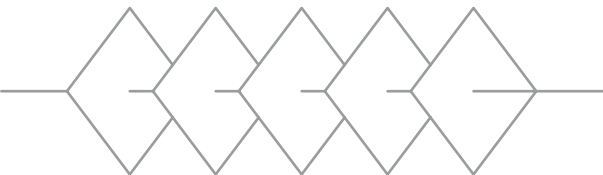
Yes-only recommended in special circumstances.

FEES

2% or as negotiated.

IDEAL OPTION FOR

An endowed gift, especially a legacy gift, that wishes to serve targeted community needs.



YES& FUND

GOAL

Responding to emerging community needs.

HOW IT WORKS

The YES& Fund allows GTCF full discretion to decide what charitable grants will be made.

DONOR ROLE

Makes gift(s) to the YES& Fund.

BENEFICIARY

Pierce County.

ABILITY TO FUNDRAISE

Yes

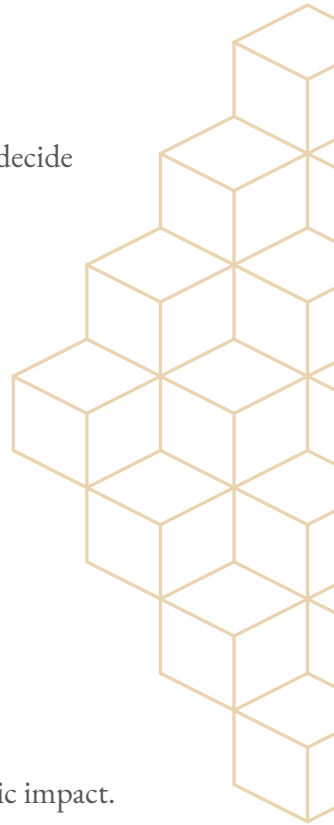
FEES

2% or as negotiated.

IDEAL OPTION FOR

Individuals looking to amplify their philanthropic impact.

YES^{TO}
THE
POWER
OF  **&**



ENDOWMENT STATUS

Funds can be established in your name, or in the name of your family, organization, or someone you wish to honor.

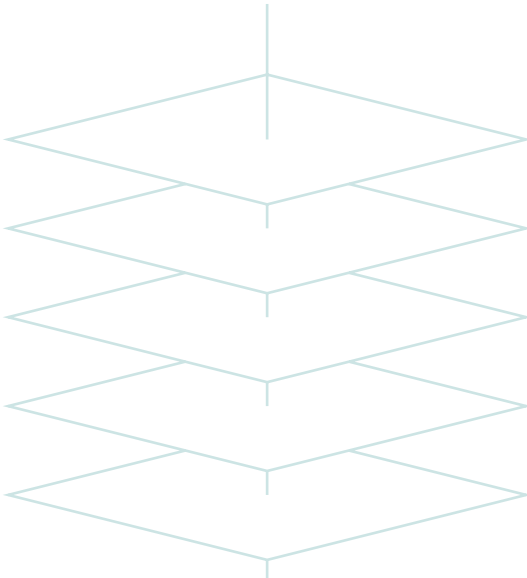
You can choose to endow your fund or not.

ENDOWED

- + Permanent Fund
- + The principal is invested. GTCF investment policy determines annual Available to Spend for grantmaking
- + Recommended Minimum: \$25,000

NON-ENDOWED

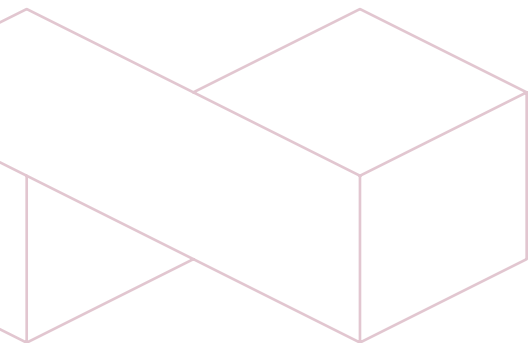
- + Spendable Fund
- + Entire fund balance is available for grantmaking
- + Recommended Minimum: \$10,000



WHAT YOU CAN EXPECT FROM GTCF

WHEN YOU OPEN A FUND AT GTCF YOU HAVE A TRUSTED PARTNER THAT WILL:

- + Provide philanthropic advising
- + Provide legacy advising
- + Manage charitable giving paperwork
 - Eliminate the need to submit a 990 or charitable giving receipts.
 - Acknowledge all charitable gifts to the fund
 - Fund Advisor Portal Access
 - Quarterly Reports
 - Annual Check-in
- + Manage grants from the fund
- + Invest and manage the fund via the portfolio you choose
 - Low Risk
 - Short-Term
 - Long-Term
 - Socially Responsible



GREATER
TACOMA | *gtcf*
COMMUNITY
FOUNDATION

WWW.GTCF.ORG