

# PASS THROUGH DESIGNATED FUND

*Supporting specific charities.*

## GIVE TO THE CHARITIES YOU CARE ABOUT MOST

- With an initial contribution of \$10,000 in cash or appreciated assets, you designate specific charities to receive an allocation of funds.
- Designate the timeframe/lifespan of the fund.
- Recommend the investment program (choice of two) used for the account.
- Receive any earnings above the professional service fee, back into the account, tax free.
- Receive a quarterly statement.
- Monitor account activity online.
- Consolidate your record keeping and let us provide you with the necessary paperwork at tax-time.
- Receive recognition for your grants or remain anonymous.

## GIVE WITH FLEXIBILITY

- You are eligible for a tax deduction upon receipt of your donation into the account.
- Avoid capital gains by donating long-term appreciated assets such as public or privately held stock, real estate, mutual funds and life insurance into the account.

## GIVE WITH CONFIDENCE

- Take advantage of our philanthropic services. Tell us what you want to accomplish or what you care about – we'll help you focus your resources to make the most impact.

FOR MORE INFORMATION, CONTACT [DENNIS@OMAHAFUNDATION.ORG](mailto:DENNIS@OMAHAFUNDATION.ORG) OR (800) 794-3458.



Omaha Community  
Foundation

**Let good grow.**

*Simplify your giving.*

## HOW YOUR PERSONAL GIFTS BECOME FOUNDATION GRANTS



## DESIGNATED PASS THROUGH FUND FEES

The professional service fee for Designated Pass Through Funds is 5.00%, with a minimum annual fee of \$500, with declining fees above \$100,000 (see detail below).

Fund fair market value	Total annual fee
Up to \$100,000	5.00%
From \$100,000 to \$500,000	2.50%
From \$500,000 to \$1 million	1.25%
Amount above \$1 million	0.75%

- No cash gifts will be processed, only checks, credit card payments and various assets (dependant on OCF's gift acceptance policy.)

FOR MORE INFORMATION, VISIT [OMAHAFUNDATION.ORG/SWIOWA](http://OMAHAFUNDATION.ORG/SWIOWA).