The Community Foundation of Shelby County

Gift Accounts and Donor Advised Funds

Similarities and Differences*

	Gift Accounts	Donor Advised Funds
Fund Type	Donor Advised	Donor Advised
Fund Size	No Minimum Requirement	$25,000 Minimum Requirement
Continuity	Non-Endowed – Spends all Donations	Non-Endowed/Endowed
Advisory Committee	Advised by Donors (individual or couple)	Advised by Donor, Family, or Advisory Committee
Successor Advisors	Only for Depleting the Fund	Can become active Advisors of the Fund
Investment	Money Market Account	Choice of three investment pools
Fees	None. Earnings retained by CFSC	CFSC Administrative and Investment Fee Applies
Available to Disburse Grants	Entire balance of account	Depends on Continuity
Fund Future	Account Closes with Donor	Fund can Transition according to Fund Agreement
Visibility	None	In Publications & Online
Naming	Limited Flexibility	More Flexibility

**Please refer to Gift Account Policy and Donor Advised Policy for additional information.*

Our Donor Relations Director, Jordan Knepper is happy to help you get started with your personal philanthropy.

Contact him at (937) 497-7800 or jknepper@commfoun.com