



Donor Advised Fund Guidelines

- It is recommended that Donor Advised Accounts be opened with a minimum of \$10,000.00.
- Funding is accepted by check, wire transfer and marketable securities (please contact the Foundation office for security transfer instructions). Contributions qualify for tax deduction in the year given, while your grants can be made at any time.
- Donors may appoint a Successor or Successors to designate gifts from the account.
- Gifts must be designated for any IRS qualified charity, a specific purpose or allocation can be included in the transmittal letter.
- Gifts may not be used for any private benefit, such as school tuition, dues or memberships, benefit tickets, fundraising dinners, your time or services, gifts to individuals, goods bought at auction or to fulfill pledges.
- Donor Advised Gift Forms can be obtained from the Foundation office or downloaded from the www.orfound.org website's "Giving" page. After receipt of your form, you will be notified when funds have been approved and distributed to the charities.
- Minimum Account Balance \$1,000.