

Donor-Advised Funds

More ways to give. One convenient resource.



Let us assist you with your charitable giving.

If philanthropy is one of your priorities, establishing a donor-advised fund at the Upstate Foundation may be the next best step toward achieving your charitable goals.

A donor-advised fund can be established by an individual or company at the Foundation in order to disburse charitable gifts to qualified not-for-profit organizations. This includes, of course, Upstate Medical University *as well as* local and national nonprofits that are meaningful to you. Simplify your giving and enjoy the tax advantages of a donor-advised fund.

UPSTATE
FOUNDATION

Where your gift impacts the
health of the entire region.

www.UpstateFoundation.org/DAF

Now you can support Upstate *and* other causes you care about!



Create your fund

Open your fund with a minimum of \$5,000 (not invested) or \$10,000 and participate in expertly invested/managed funds held by the Foundation which reports returns to you annually (you are not taxed on gains in your fund).

- Receive a tax deduction for the tax year of the donation, for the amount donated to the fund.
 - Additional cash and/or appreciated securities may be added to the fund at any time.
 - Add to the fund at any time and receive a current tax deduction.*

Name your fund. It can be in your name, business name, or be creative and have it reflect something that is significant to you, your family or business.

- Some donors use the fund and its naming to engage their family in the joy of philanthropy. Engage your family, even grandchildren in this process as a wonderful way to share your values and legacy with the generations that will follow.

Name a successor fund advisor. By naming a successor, your philanthropic goals will continue long after you are gone. Or you can name a fund at Upstate or another charity to receive the final proceeds upon your death.

Let us do the work for you. Simply let the Foundation know when you want to disperse charitable gifts from your fund and we do the rest and send you confirmation of the disbursements.

Working with the experienced and trusted team at the Upstate Foundation, established in 1976, you and your donor-advised fund are well positioned to meet your philanthropic goals.

To get started in establishing your fund, contact the Upstate Foundation at 315-464-4416 or email FDN@upstate.edu

* Check with your tax advisor to see how this applies to you.