

Donor Advised Funds: Soup to Nuts
&
Back-Office Services

Roxie Jerde
Janeen Kammerer

October 21, 2010

"The Purpose-Driven Foundation: People Passion Possibilities"



Greater Kansas City Community Foundation

- Began in 1978 with \$219.13
- Today
 - \$1.2 Billion in Assets
 - Over 3000 funds
 - Donor-centric model
 - In the top 10 of over 650 community foundations in gifts, grants and assets since 1999
 - Leading provider of charitable giving services

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“We make a living by what we get,
we make a life by what we give.”

Sir Winston Churchill

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- The purpose of **The National Association of United Methodist Foundations (NAUMF)** is:
- To create a new consciousness of Christian philanthropy
- **To enhance the giving heart**
- To strengthen the local church for ministry, and
- To strengthen the general church for ministry.

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Opportunity!

- 2009 Charitable Giving
 - \$304 Billion
 - 75% Individuals
 - 8% Bequests
 - 13% Foundations
 - 4% Corporations

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2009 Charitable Donations went to:

1. **33% Religion**
2. 13% Education
3. 10% Foundations
4. 9% Human Services
5. 8% Public and Societal Benefit
6. 7% Health
7. Other (Arts 4%, International 4%, Environment/Animals 2%)

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- Donor Advised Funds are **GIVING** Funds
- What is the appeal?
 - Easy way to organize your giving
 - Allows you to be more intentional and thoughtful about your giving
 - Way to easily support your faith
 - Tax advantages
 - Grow your fund through investments

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- Trigger Points
 - Spiritual
 - Point in Time Event
 - Belonging
 - Greater Good
 - Functional

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- Dating
 - Identify prospects, referrers, professional advisors
- Getting Married
 - Honeymoon: Magical first year
 - Growing the relationship
- Reaching Golden Anniversary
 - Sustaining the relationship
 - Legacy planning

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- Donor Engagement
 - 101: Learn and Organize
 - “What’s Important to You” – linking values, passion and resources
 - Understanding past giving – support a few or many causes
 - How determine what is an effective nonprofit
 - Checkbook philanthropist

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- 201: Invest in Community
 - Defines personal mission statement
 - Gives because aligns with personal mission
 - Includes family in giving
 - Investor, not check writer, with results orientation
 - Developing understanding of root causes of social problems

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- 301: Leave a Legacy
 - Giving is planned in line with vision and philosophy
 - Able to evaluate effective nonprofits and build capacity
 - Leverage resources by collaborating
 - Works with professional advisors to plan legacy and maximize giving strategies

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- *It is a waste of important potential if foundations do not make use of the special freedoms they have been given...to facilitate change rather than automatically endorsing the status quo...to act and not merely react; to initiate, even to gamble and dare.*

-Waldemar A. Nielsen,
Author, Golden Donors

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Services to
Foundations
At a Glance

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- GKCCF through Greater Horizons provides administrative and back office services to regional and national foundations
 - Hospital foundations
 - University foundations
 - School district foundations
 - Community foundations

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- Reduce the cost of infrastructure and overhead
- Collaborate with a team of foundation professionals that understand best practices, donor-centered service, gift fund management
- Eliminate the time spent “at the desk” and increase the time spent meeting with donors



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- Menu of services
 - Separate accounting for each donor fund
 - Accounting for investments, income allocation and reconciliations
 - Ability to customize investments by fund to meet cash flow needs
 - Ability to allow donors to choose their investment strategy and financial advisor

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- Full accounting and processing of transactions, including gifts, vendor payments, grants and scholarships
- All gift receipts are prepared for your signature
- All disbursements are on customized check stock



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Building a Stronger Kansas City Fund (buil04)

Contributions	
Year-To-Date - 2009:	\$0.00 See Details
Last Year - 2008:	\$1,000.00 See Details
Cumulative (since 11/17/2008):	\$1,000.00 See Details
Grants Paid	
Year-To-Date - 2009:	\$75.00 See Details
Last Year - 2008:	\$0.00 See Details
Cumulative (since 11/17/2008):	\$75.00 See Details
Grants Pending	
Total:	\$0.00 See Details
Suggestion(s) Pending	
Total:	\$0.00 (0)
Investment Income	
Year-To-Date - 2009:	\$5.15 See Details
Last Year - 2008:	\$2.89 See Details
Assets	
Year-To-Date - 2009:	\$933.04 See Details
Last Year - 2008:	\$1,002.89 See Details
Fund Balance**	
Total:	\$933.04 See Details
Fund Statement	
Select a range <input type="text" value="07/01/2009 - 09/30/2009"/> <input type="button" value="v"/>	
<input checked="" type="radio"/> View fund statement*	
<input type="radio"/> Email fund statement to <input type="text"/>	
<input type="button" value="Get Statement"/>	

- 24/7 online donor fund management

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- Donor fund statements
- Financial reports for management and the board
- Federal and state regulatory reporting

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- Contact information: 866-627-3440;
support@greaterhorizons.org