

Setting up a donor-advised fund



Giving away money to a charity sounds like an easy thing to do but, with over 30,000 registered charities and thousands more community groups in Wales, it can be hard to know where to begin and who to give to.

This is where Community Foundation Wales can help.

Giving through us will allow you to focus on how and where you want to give. Whether you want to take a long term approach or invest in immediate impact, setting up a donor-advised fund will help you to channel your giving towards what really matters to you.

A donor-advised fund is an alternative to establishing a charitable trust, offering the benefits of a private trust without the burden of governance, due diligence and financial reporting. We offer the flexibility to choose the level of engagement and anonymity that suits you.

With advice from our experts in finance, charitable giving and grant management you can create a donor-advised fund that gives you a tailored structure to support your giving and ensures that your philanthropy is personally shaped to what matters to you.



A donor-advised fund can be set up in one of three ways:

Endowment

A donation that you can specify how, where and on what you would like your money to be spent. As it is an endowment fund, the amount is invested ensuring that the gift you leave keeps giving and benefitting people and communities long after you have passed away.

Immediate impact

A donation that you can specify how, where and on what you would like your gift to be spent and we will administer the grants in accordance with your wishes until the money runs out.

Hybrid

A combination of endowment and immediate impact funds.

How we can support you:

- With a donor-advised fund, we support you in shaping a grants programme and use our extensive network of third sector groups across Wales to ensure that your fund reaches those most in need.
- We will promote your fund and ensure high awareness among the local community. We will regularly monitor the impact of your support, so that we can help inform your future giving decisions.



For more information contact Katy Hales, Manager, Donor Advised Giving by emailing katy@communityfoundationwales.org.uk or calling 02920 379580