

Types of Charitable Endowment Funds

Consider a **Donor Advised** Fund if you:

- Want to manage all of your giving from one convenient account
- Want to be actively engaged in your philanthropy
- Wish to give to multiple organizations and programs throughout the year
- Are interested in learning more about Marion and its challenges
- Want to involve your children or family in your charitable giving

Giving becomes convenient and personal with a Donor Advised Fund. Donor Advised Funds are the number one option for donors who value flexibility, choice, and a hands-on approach to giving, and are ideal for those wanting to give to multiple organizations and programs. Donor Advised Funds can be set up with as little as \$5,000. Due to this fund's personalized approach, it is one of our most popular fund types at Marion Community Foundation.

A Donor Advised Fund is a personalized fund that makes it easy for you to support the issues and organizations you care about in the Marion area. You can use cash, stock, or other assets to create a named fund, qualify for an immediate income tax deduction, and choose the charities you want to support.

Key Benefits

- Provides immediate tax deduction with the option of deferred charitable distribution
- Consolidates your charitable giving, providing administrative convenience
- Offers flexibility to choose multiple grant recipients
- Provides the ability to add to the fund at any time
- Makes giving anonymously an option, if desired
- Creates a family legacy — name your children, grandchildren or other loved ones as successor advisors to the fund

James & Margaret Coulson Charitable Fund

This donor advised fund was created in 2014 by Susan E. Brown to honor her uncle and aunt, James & Margaret Coulson. Director of pharmacy services for Walgreens Pharmacy at OhioHealth Marion Medical Campus, Susie is a past member of Marion Community Foundation's Board of Directors. Connected to the agricultural community, she and her husband, Tom, are the fourth generation on their family's Maken Bacon Farm.



**MARION COMMUNITY
FOUNDATION**

For You. For Marion. Forever.



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