

LOCAL

PHILANTHROPIC FUND

A BETTER WAY TO MAKE A DIFFERENCE

THE LOCAL PHILANTHROPIC FUND, INC. makes charitable giving easy. As a donor advised fund, it allows you to donate to your own Local Philanthropic fund and get an immediate tax deduction, then your donation is invested to grow over time – tax free – before you ultimately donate the funds to a charity of your choice.

HOW IT WORKS

CONTRIBUTE

Donors make a charitable contribution to Local Philanthropic and receive an immediate tax benefit. Contributions can include cash or publicly-traded investments, like stocks and bonds.

INVEST

Your contribution is then invested according to your preferences to grow tax-free, which will allow you to make a larger gift to the charities of your choice.

GRANT

You can recommend grants of any size at any time to qualified U.S. public charities. You can even recommend grants online, making the donation process a breeze. We will do the due diligence to make sure your charity meets IRS guidelines.

BENEFITS OF A LOCAL D.A.F.

- An account is easy to set up
- A personalized investment strategy is created for your donated funds
- A smaller fee is charged if the account value is lower on the month
- There are no costs to open an account and no additional expenses
- Free nonprofit reviews to make it easy to find the right charity
- Your fund can be named after your family, or in honor of a relative, friend, or a cause
- Local Philanthropic is completely independent with no conflicts of interest
- You have the same advantages as a private foundation, but without the cost and administrative burdens
- Receive an immediate tax deduction
- Create a legacy for you and your family

Investments in your donor advised fund are professionally managed by Bluefin Investment Management, which has managed investment portfolios since 2009. Accounts can be opened for as little as \$5,000 and additional contributions can be made in any amount. Additionally, you can grant your funds to a qualified charity at any time and for any amount.

Let us help make the most of your philanthropic giving! Opening an account is as easy as filling out an application and making a donation. Visit www.localphilanthropic.org for more details.

Local Philanthropic Fund, Inc. is a 501(c)(3) public charity. Contributions are tax deductible as allowed by law (Tax ID: 81-5130625). A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING 1-800-435-7352. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. Florida registration number CH50751.



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