



Your
VISION
Your
VALUES
Your
IMPACT

DonorsTrust
25th Anniversary
DONOR PROSPECTUS



DonorsTrust: A Principled Alternative

This year, DonorsTrust celebrates 25 years of service to the philanthropists whose generosity fuels the liberty movement and transforms communities across the country.

Launched in 2000 by Kim Dennis and Whitney Ball, DonorsTrust was established to protect the charitable intent of donors dedicated to the principles of limited government, personal responsibility, and free enterprise. That mission is just as important today as it was a quarter-century ago.

Many conservative and libertarian donors worry about managing their charitable giving in a way that aligns with their limited-government values. For the past 25 years, we have helped donors like you have a positive, principled impact with their giving in a simple, private, and tax-friendly way. DonorsTrust is the charitable partner that not only understands your commitment to liberty but shares it, too.

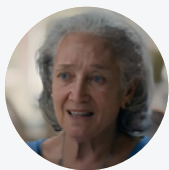
We offer donor-advised funds — your own charitable savings account. With a short application and an initial tax-deductible contribution, your fund can be a one-stop tool for managing and protecting your philanthropy.

Coupling the tax advantages, flexibility, and privacy of a donor-advised fund with the expert knowledge and personal attention of DonorsTrust staff lets you grow your giving with confidence.

You worked hard to be able to give to the causes you care about. Let DonorsTrust help you leave your legacy of liberty. With DonorsTrust, it's always Your Vision. Your Values. Your Impact.

DonorsTrust: An Easy Way to Give

Gifts into your DonorsTrust charitable-giving account are immediately tax deductible. You can begin granting those funds out to charities right away or grow your giving potential with various investment options as you explore which charities you'd like to support. When you're ready to recommend grants, we make the process simple and easy.



“For me, the biggest help is simply the making of the donation. I still maintain a spreadsheet. I still track who we gave to, when we gave, how much we gave to. But it's the process of actually making the donation that DonorsTrust saves me a lot of time.”

—Frayda Levy, DonorsTrust giver



Scan here to watch Frayda's giving story

By the Numbers in 2024

Through our donor-advised-fund program, DonorsTrust simplifies, protects, and promotes charitable giving. Whether engaging younger donors through the Novus Society, assisting men and women in the height of their careers with their annual giving, or working with those developing estate plans to ensure their values outlast them, DonorsTrust serves as a committed partner to donors' philanthropic goals.

Average account size*:	Average grant:	Median account size:	Median grant:
\$531,068	\$59,500	\$25,998	\$2,000
Contributions to accounts:	Grants to charities:	Public policy giving:	
\$227,882,340	\$264,409,536.35	66%	
4,446 grants recommended to 1,495 unique charitable organizations			

*Average account size excludes outliers

The Benefits of Partnering with **DonorsTrust**



Simplified Giving

Opening an account is simple. Once open, our team handles the administrative details of giving so you can focus on your impact.



Tax-Advantaged

Receive more generous tax treatment than a private foundation. Stretch your giving even more with gifts of appreciated stock or real estate.



Personalized Service

When you call our office, you'll talk to a person. We believe simplifying giving means personalizing it as well.



Flexible Giving

Gain more flexibility in timing and privacy than with a private foundation or traditional checkbook giving.



Donor Intent Protection

We share your passion for using philanthropy to support the cause of liberty, and we are committed to protecting your donor intent.



Commitment to Liberty

We know the liberty movement, and, like our clients, we want to see the organizations advancing liberty thrive.



Whitney Ball Legacy Society

Your DonorsTrust donor-advised fund can be the charitable hub for your legacy plan. Use a bequest account with the Whitney Ball Legacy Society to safeguard your charitable principles. A fund can serve as the charitable beneficiary of your estate plan or for a complex or split-interest gift, allowing for more strategic philanthropy both in life and as a legacy.

“Donor intent is a big problem. Because, as time marches on, boards of directors of foundations change — the purpose changes. The next thing you know, what you thought you were giving money to, you're giving money to something that supports just the opposite. DonorsTrust is a big help there.”

— Bill Walton, DonorsTrust giver



Scan here to watch the Waltons
share their giving story



How Does a **Donor-Advised Fund** Work?

A donor-advised-fund account is the easiest, most efficient way to manage your charitable giving.

Think of it as your own charitable savings account. Many use a donor-advised fund as an alternative to a private foundation, eliminating the need for required distributions, mandatory IRS filings, and annual excise taxes.

To begin, establish your DonorsTrust account with an initial contribution. You can fund the account with cash or in other tax-advantaged ways: using appreciated stock, closely held stock, or other assets like real estate. All contributions to the account are immediately tax deductible and, as such, are legally controlled by DonorsTrust.

Through the account, you, your family, or your designated advisor(s) can request grants to public charities. You may make grant recommendations to a variety of local, national, or international non-profit organizations at any time and throughout the life of your account. Making grant requests is simple: Use our online portal, e-mail, or call us directly.

Maximize your charitable efforts by investing your account's assets in various investment pools maintained by DonorsTrust. This can become an important strategy to enhance your giving power over time.



Complete Your Application

A simple application gets you started.



Contribute & Take Your Deduction

Your initial tax-deductible contribution opens the account.



Support Your Causes

Recommend grants to public charities.



Build Your Charitable Legacy

Create a lasting impact for people and ideas through your grant-making over time.

Account Basics

Traditional Donor-Advised-Fund Account:

Minimum initial contribution: **\$10,000**

Minimum subsequent contribution: **\$100**

Novus Society Account:

Minimum initial contribution: **\$1,000**

Eligible for grant-making at **\$5,000**

Legacy Account:

Required lifetime contribution: **\$0**

Maximum life of fund: **25 years**

All Accounts:

Minimum grant recommendation: **\$100**

Minimum annual grant-making requirements: **\$0**

Administrative fees start at **0.75%** of the annual account balance for funds up to \$1 million and decline with higher balances.

All contributions, once accepted to donor-advised-fund accounts or strategic venture funds, are irrevocable charitable gifts to DonorsTrust, a 501(c)(3) public charity. DonorsTrust has exclusive legal control over the assets contributed, and does not provide goods, services, or personal benefits in exchange for contributions. Grants from accounts are made upon request to board-approved charities. Grants from accounts are not approved if a grantee provides any person goods, services, or release from an existing legal obligation (including a legally binding charitable pledge) in return. Grantees must be publicly supported charitable organizations or private operating foundations, and may not use grant proceeds for lobbying or political campaign activities.

A Look at Some of Our Grantees

About half of our clients' grant recommendations go to liberty-oriented policy groups — including state and national think tanks, student programs, university centers, and public-interest-law organizations. Our clients also give generously to medical, arts, religious, and civic charities that don't rely on significant amounts of government funding (generally not more than 25%). Below is just a sampling of the hundreds of organizations that receive support through grant recommendations from our clients.

Arts & History

American Battlefield Trust
Calvin Coolidge Presidential Foundation
Emergent Order Foundation
Jewish Creativity International
Mayo Performing Arts Center
The Moth
Moving Picture Institute
Mt. Vernon Ladies' Association
Sarasota Orchestra
Shakespeare Theatre Company
Wolf Trap Foundation for the Performing Arts
World Monuments Fund

Civic Organizations

American Friends of Start-Up Nation Central
America's Future
Best Friends Animal Society
Center for Urban Renewal and Education
Code 3 Association
Doe Fund
Friends of the Israel Defense Forces
Human Coalition
Institute for the Rights of Abused Children
Leadership Program of the Rockies
National Constitution Center
One Generation Away
Protect Our Parks
Project on Fair Representation
Salvation Army
Woodson Center

Education

Black Minds Matter
Certell, Inc.
Children's Scholarship Fund
Economic Fundamentals Initiative
Multidisciplinary Association for Psychedelic Studies
Open Discourse Coalition
PragerU
Success Academy Charter Schools

Higher Education

CERGE-EI Foundation
Institute of World Politics
Florida Southern College— Kerr Chair in Leadership
Georgetown— Center on the Constitution
GMU— Antonin Scalia Law School; C. Boyden Gray Center; Law & Economics Center
Hillsdale College
Ohio State— Business Law Journal
U. of Arizona— Center for the Philosophy of Freedom
U. of Texas – Austin— Clements Center for National Security
Palm Beach Atlantic University— Rinker School of Business
Stanford U.— Hoover Institution
Texas A&M— Center on the Structural Constitution
University of Austin
William Marsh Rice U.— Baker Institute

Medical & Science

Autism Research Institute
Cedars-Sinai Medical Center
Children's Healthcare of Atlanta Foundation, Inc.
Geriatric Dental Group
International Medical Corps
MedStar-Georgetown Medical Center
Mathematical Sciences Research Institute
Shriners Hospitals for Children
St. Jude Children's Research Hospital
Tufts Medical Center

Public Interest Law

Alliance Defending Freedom
America First Legal Foundation
Becket Fund for Religious Liberty
Energy & Environment Legal Institute
Hamilton Lincoln Law Institute
Institute for Justice
Mountain States Legal Foundation
National Right to Work
New Civil Liberties Alliance
Pacific Legal Foundation
Thomas More Society

Public Policy

Accuracy in Media
ACTA
Acton Institute
Advocates for Self-Government
American Enterprise Institute
American Federation for Children Growth Fund
America First Policy Institute
Americans for Prosperity Foundation
American Independent Media
Archbridge Institute
Atlas Network & Members
Ayn Rand Institute
Capital Research Center
Cato Institute
Center for American Greatness
Center for Common Sense in Science
Center for Independent Thought
Club for Growth Foundation
Commonwealth Foundation
Competitive Enterprise Institute
Conservative Partnership Institute
Consumers' Research
Daily Caller News Foundation
Decriminalize Sex Work
Discovery Institute
Do No Harm
FDRLST Media Foundation
Federalist Society
Foundation for Government Accountability
Franklin News Foundation
Free to Choose Network
Goldwater Institute
Government Accountability Institute
Heritage Foundation
Human Rights Foundation
Independent Women's Forum
Informed Consent Action Network
Institute for Free Speech
Institute on Religion & Democracy
Job Creators Network Foundation
Lucy Burns Institute
Mackinac Center
Manhattan Institute
Mercatus Center
National Review Institute
National Right to Life Educational Foundation

National Taxpayers Union Foundation
People United for Privacy Foundation
PERC
Philanthropy Roundtable
Real Clear Foundation
Reason Foundation
Second Amendment Foundation
State Financial Officers Foundation
State Policy Network & Members
Tax Foundation
Teneo Network
Unleash Prosperity

Religious

American Humanist Association
Chabad of Southampton
Communio Foundation
Cru
Fellowship of Catholic University Students
Focus on the Family
Libertarian Christian Institute
Missionaries of Charity
Oakseed Ministries International
Passages America Israel, Inc.
Tikvah Fund
Young Life
Witherspoon Institute

Student Programs

Bill of Rights Institute
Forge Leadership Network
Foundation for Economic Education
Fund for American Studies
Institute for Humane Studies
Leadership Institute
Students for Liberty
Turning Point USA
Young Americans for Liberty Foundation
Young America's Foundation
Young Voices

International

Adam Smith Research Trust
Austrian Economics Center
Center for Indonesian Policy Studies
Institute of Economic Affairs
Pharos Foundation
Universidad Francisco Marroquín



Novus Society

The Novus Society offers emerging philanthropists under 40 access to a donor-advised fund at a lower cost. Novus accountholders engage with like-minded peers and established philanthropists to grow their charitable impact.

“The more we can get young people to start giving early on, even in small amounts, the more there's going to be available for next generations to make an even bigger impact and use it more effectively.”

— Alexander McCobin, Novus Society at DonorsTrust giver



Scan here to
watch Alexander's
giving story





“The thing that impresses me is having the confidence that the money we put into it is not going to go to do something that I object to. So many places, you give your money and, once they have your money, they do what they want with it. DonorsTrust really tries to keep the intent of what we want our charity to go to.”

—Sarah Walton, DonorsTrust giver

DonorsTrust

The Community Foundation for Liberty

Donor-Advised Funds | Philanthropic Guidance | Legacy Protection



DT Philanthropic Services

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“DonorsTrust over the years has accomplished and done all the things that Whitney and I originally envisioned for it. In terms of principles, goals, mission, nothing has changed from the start. And nothing will ever change. Its core mission is to help donors who want to advance the cause of liberty.”

—Kim Dennis, DonorsTrust co-founder and board chair

