



give

DonorsTrust

The Community Foundation for Liberty

DONOR PROSPECTUS



DonorsTrust: A Principled Alternative

In today's polarized climate, many conservative and libertarian donors worry about being able to manage their charitable giving in a way that aligns with their values.

At DonorsTrust, we help donors like you have a positive, principled impact with your giving in a simple, private, and tax-friendly way. We are a charitable partner that not only understands your commitment to liberty but respects it, too.

We do this by offering 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.

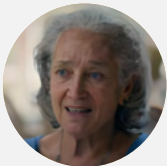
Too often, we see stories of large foundations, “enlightened” business leaders or even a donor’s own children working against a donor’s values. When only one side of an issue gets heard, our country grows weaker. Don't sit on the sidelines while those who don't share your principles redirect your charitable dollars in a way that dishonors your legacy.

Your giving matters in keeping America strong. 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.

DonorsTrust: An Easy Way to Give

Your DonorsTrust charitable-giving account allows you to take an immediate tax break (assuming you itemize your deductions) while giving you the freedom to let your charitable-giving account grow with various investment options as you decide which charities to give to.



“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 Levy's giving story

By the Numbers in 2023

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:
\$450,349

Median account size:
\$19,228

Average grant:
\$85,322

Median grant:
\$2,000

Contributions to accounts:
\$225,390,384

Grants to charities:
\$351,016,183

Public policy giving:
56%

New funds rolled over from other DAFs:
14%

4,114 grants recommended to **1,388** unique charitable organizations

The Benefits of Partnering with **DonorsTrust**



Simplified Giving

Opening an account is simple. Once open, our team handles the administrative side 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 on timing and privacy than with a private foundation or 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 we, like our clients, want to see those organizations advancing liberty grow.



Whitney Ball Legacy Society

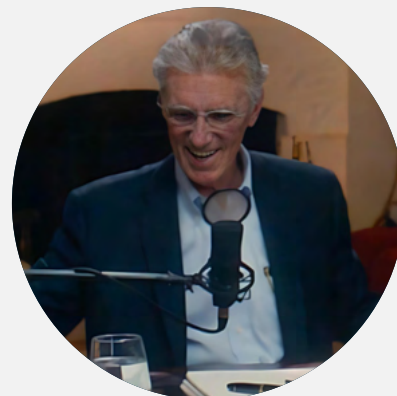
Your DonorsTrust donor-advised fund can be the charitable hub for your legacy plan. Use a bequest account with the Whitney Ball Legacy Society to safeguard your charitable principles. A fund can serve as the charitable beneficiary of your estate plan or for a complex or split-interest gift, allowing 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, thus eliminating the need for required distributions, mandatory IRS filings, and annual excise taxes.

To begin, you 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 contribution opens the account. Contributions are immediately tax deductible.



Support Your Causes

Recommend grants to any number of public charities.



Build Your Charitable Legacy

Make an impact for people and ideas with 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 60% 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 Friends of the Israel Museum
American Private Radio
Calvin Coolidge Presidential Foundation
Emergent Order Foundation
Fractured Atlas
Mt. Vernon Ladies' Association
Orchestra of St. Luke's
Shakespeare Theatre Company
TalesIn Nexus
Wolf Trap Foundation for the Performing Arts
World Monuments Fund

Civic Organizations

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

Education

Achievement First, Inc.
Black Minds Matter
Certell, Inc.
Children's Scholarship Fund
Economic Fundamentals Initiative
Multidisciplinary Association for Psychedelic Studies
National Microschooling Center
PragerU
Success Academy Charter Schools

Higher Education

Catholic U.— Principled Entrepreneurship Program
Georgetown— Center on the Constitution
GMU— Antonin Scalia Law School; Mercatus Center
Hillsdale College
Ohio State— Business Law Journal
U. of Arizona— Center for the Philosophy of Freedom
U. of Chicago— Arnold C. Harberger Professorship
U. of Texas – Austin— Clements Center for National Security
Ralston College
Texas A&M— Center on the Structural Constitution
University of Austin
William Marsh Rice U.— Baker Institute

Medical & Science

American Hospital of Paris Foundation
Cedars-Sinai Medical Center
Children's Healthcare of Atlanta Foundation, Inc.
Cold Spring Harbor Foundation for AIDS Research
Geriatric Dental Group
Johns Hopkins University
Informed Consent Action Network
MedStar-Georgetown Medical Center
Mathematical Sciences Research Institute
Shriners Hospitals for Children

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

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
Atlas Network & Members
Ayn Rand Institute
Beacon Center of Tennessee
Capital Research Center
Cato Institute
Center for American Greatness
Center for Common Sense in Science
Center for Independent Thought
CERGE-EI Foundation
Club for Growth Foundation
Committee to Unleash Prosperity
Commonwealth Foundation
Competitive Enterprise Institute
Conservative Partnership Institute
Consumers' Research
Daily Caller News Foundation
Decriminalize Sex Work
Discovery Institute
FDRLST Media Foundation
Federalist Society
Foundation for Government Accountability
Franklin News Foundation
Free to Choose Network
FreedomWorks Foundation
Goldwater Institute
Government Accountability Institute
Heritage Foundation
Human Rights Foundation
Independent Women's Forum
Institute for Free Speech
Institute for World Politics
Institute on Religion & Democracy
Job Creators Network Foundation
Lucy Burns Institute
Mackinac Center
Manhattan Institute
Market Research Foundation
Moms for Liberty
Moving Picture Institute

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 Policy Network & Members
Tax Foundation
Teneo Network

Religious

American Humanist Association
Beth El Hebrew Congregation
Benedict XVI Institute
Chabad of Southampton
Christian Union
Communio Foundation
Cru
Fellowship of Catholic University Students
Libertarian Christian Institute
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

International

Adam Smith Research Trust
Austrian Economics Center
Center for Indonesian Policy Studies
Collateral Global
Universidad Francisco Marroquín



Novus Society

The Novus Society offers emerging philanthropists under 40 access to a donor-advised fund at a lower cost, allowing younger givers to start their giving journey. 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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“The point of giving to philanthropic causes is to make a change; it’s not just to feel good or fulfill an obligation. It’s to make a difference.”

—Alexander McCobin, DonorsTrust giver

