



Leave a Legacy

Ensure Lasting Support for the Causes and Not-for-profit Organizations You Care About During Your Lifetime

Making a charitable gift through your planned gift or estate plan is a simple, tax-friendly way to support the causes, charities and community you love far into the future.



Leaving Your Legacy

Whether you are looking to provide funding for your favorite charitable causes or organizations long after you are gone, or want to give to charity through your estate while taking care of your loved ones, deferred funds through The Dayton Foundation offer a wide variety of flexible, tax-advantageous options to suit your needs and stretch your charitable dollars.

Benefits of Planned Giving

Creating a deferred fund through The Dayton Foundation with a gift in your will or financial or estate plan can:

- significantly reduce your tax liability,
- preserve your charitable intent in perpetuity,
- provide sustained giving for your favorite church, school or nonprofit organization,
- provide added income benefits for you and your family when a life income plan is involved, and
- simplify distribution of your estate's assets to multiple charities through one giving vehicle.

The Foundation's sound investment oversight and trusted stewardship ensure your fund's assets are sustained and distributed in the manner you intended for generations to come.

Types of Gifts

The Dayton Foundation accepts a variety of planned and deferred gift vehicles, including:

- life insurance,
- bequests,
- life estate remainder interest,
- remainder of retirement plan (IRA) assets,
- charitable trusts, and
- life income plans.

Your assets can be designated to a named fund at the Foundation that will award grants for causes or the organizations important to you in perpetuity, over a period of time or as a one-time gift.

Types of Deferred Funds

The Dayton Foundation offers an array of options with the degree of recognition (or anonymity) you desire. Our knowledgeable staff can help customize a giving plan that fits your charitable wishes and financial goals. We are happy to review the following fund options with you and/or your advisor.

Community Impact Funds help the Foundation leverage dollars to support innovative and collaborative projects and initiatives.

Scholarship Funds help students achieve their educational goals and set them on a path for future success.

Field-of-Interest Funds support evolving needs and a variety of Greater Dayton non-profits focused on your selected area of interest, such as animals, arts and culture, youth and more.

Designated Funds allow you to support one or more charitable organizations through annual distributions. If an organization you select ceases to exist or changes its mission, the fund can be redirected so that it continues to address your charitable intent.

Donor-Advised Funds give loved ones a hands-on approach to fulfilling your charitable giving goals and help your family build a philanthropic tradition.

Family Foundation PlusSM Funds offer the advantages of a private foundation with the benefits and resources of a community foundation.

Sample Language for Bequests and Other Designations

Establishing a deferred fund through The Dayton Foundation means you never have to change your will or trust if you so choose. You can name your fund at The Dayton Foundation to receive the assets. If modifications need to be made to your fund agreement, you can work with the Foundation to carry out your wishes.

For a specific monetary or percentage bequest in your will or trust:

I give and bequeath (the sum of \$ OR % of my estate) to The Dayton Foundation, Inc., to be held and administered as part of (name of your deferred fund).


For beneficiary or Payable on Death designations from your IRA, life insurance, banking institution or investment account, indicate the following on the forms provided by your institution:

The Dayton Foundation
(For the benefit of your named fund and fund#) Tax ID Number: 31-6027287
1401 S. Main St., Suite 100
Dayton, Ohio 45409
Phone: (937) 222-0410

Please note: You must first establish a fund through The Dayton Foundation to document your charitable intentions. It is important to work with your attorney to update your will, trust or financial documents to designate assets to your named Dayton Foundation fund.

How You Can Learn More You

The Dayton Foundation is happy to work with you and your legal or financial advisor to ensure your charitable objectives are met through your estate plan. We can help you create a deferred fund outlining how and what assets will be used to fund your planned gift, and we'll draft a deferred fund agreement detailing your charitable intentions.

For more information about any of these deferred fund options and about ways you can fund your charitable gift, call (937) 222-0410 or toll free at (877) 222-0410, and ask to speak to a member of our development department. You also may visit daytonfoundation.org. 

We're here to help you help others:

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