



We're here for good.

*The Regional Community
Foundation*

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For a listing of The
Dayton Foundation's
Governing Board members
and staff, visit our web
site or give us a call.

Better Than a Private Foundation

Family Foundation *Plus*SM-Advised
is a better alternative for people
with private foundations



By rolling your private foundation
into The Dayton Foundation's Family
Foundation *Plus*-Advised, you gain
significant advantages:

- convenience and conservation of your
time and resources*
- better sustainability – no 5% annual
disbursement required
- more favorable tax treatment of gifts**
- benefit of The Dayton Foundation's
charitable giving knowledge and
administration
- low cost
- no excise or penalty taxes
- IRS compliance ensured

- increased privacy – no separate annual 990 filings
- no separate accounting or legal fees
- no separate D&O Insurance or Surety Bonds needed
- no separate public report required
- flexibility in assets you may use***
- option to have family, friends and even minors serving as advisors to your fund
- ability to ensure family involvement through succeeding generations

* Tax filings, record keeping, administrative and investment management are handled for you by The Dayton Foundation, so you can concentrate on the purpose of your fund: to help the charities and charitable causes you care about.

** In making gifts to your fund at The Dayton Foundation (a public charity), your contributions receive the most favorable tax treatment. Cash gifts are deductible up to 50% of Adjusted Gross Income and long-term capital gains assets up to 30%, compared to 30% and 20%, respectively, for private foundations.

*** You may use a variety of assets to make gifts to your Family Foundation *Plus-Advised* fund. They include cash, publicly traded securities and mutual funds, closely held stock, real estate and other assets, subject to acceptance by The Dayton Foundation.

A Simpler, Better Alternative to Private Foundations

Individuals and families with current private foundations over \$250,000 in assets will want to look at The Dayton Foundation's newest philanthropic



*Better than a private foundation, Family Foundation *Plus-Advised* gives you added tax benefits and flexibility, access to the full range of the charitable giving knowledge of The Dayton Foundation, reduced administrative headaches and low cost. You can concentrate on your charitable giving, and leave the rest to The Dayton Foundation.*

service: Family Foundation *Plus-Advised*. Most people find it a simpler, better way to achieve the benefits of a private foundation.

Among the many benefits that Family Foundation *Plus-Advised* affords you is access to the full range of support services of The Dayton Foundation, a highly respected 501(c)(3) community foundation with more than 80 years of experience in administering donors' funds, in identifying community needs and in a wide range of charitable giving options. The Dayton Foundation's knowledgeable staff can help you make your gift do the most good.

How Can You Learn If Family Foundation *Plus-Advised* Is Right for You?

It's as simple as a phone call. You or your financial or legal advisor may call for information or an appointment to determine if Family Foundation *Plus-Advised* is right for you. Call (937) 222-0410 or toll free, (877) 222-0410, and ask to speak to a Family Foundation *Plus* officer of The Dayton Foundation.



*An important benefit of this service is that it provides you with the flexibility to determine your annual disbursement, unconstrained by the minimum 5% payout required annually of private foundations. This is one way Family Foundation *Plus-Advised* helps you to assure your fund's sustainability over time.*