



# DONOR ADVISED FUND HANDBOOK

## Community Foundation of Tompkins County

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# Donor Advised Fund Handbook

## Community Foundation of Tompkins County

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### Our Mission

Community Foundation of Tompkins County, established in 2000, has a mission to bring people and resources together to build a more equitable Tompkins County by inspiring diverse philanthropy, catalyzing collaborations and championing inclusion and justice. As much as we fundraise for immediate investments into our communities, it is just as important to establish gifts for the future. We partner with individuals, families, businesses, and organizations to create customized charitable plans using a wide range of giving tools. Together, donors' gifts build, strengthen, and sustain the services, organizations, and cultural assets that make Tompkins County a remarkable place to live.

### Leadership

Our work is guided by a 27-member Board of Directors, supported by more than 50 dedicated volunteers and a professional staff team. Together, we connect donors with community needs and strengthen nonprofits—working toward a Tompkins County that thrives through engaged philanthropy.

### Stewardship

Stewardship of charitable funds is one of our most important responsibilities. We prudently invest funds in pooled portfolios so that each fund benefits from professional, diversified asset management at reasonable cost. Our Financial Administration Committee reviews performance and holds investment managers accountable for following our Investment Policy Statement and for returns. This approach balances growth, risk management, and long-term impact.

**Community Impact Snapshot** - More than \$37 million in grants distributed - Over \$31 million in assets under management - Over 150 charitable funds - \$3-5 million granted annually

Through careful stewardship, thoughtful grantmaking, and community education, the Community Foundation serves as a trusted steward of Tompkins County's philanthropic capital.

### Partnerships & Memberships

- Diversity Consortium of Tompkins County
  - Estate Planning Council of Tompkins County
  - New York Council of Nonprofits, Inc
  - NY Funders Alliance
  - Tompkins County Chamber of Commerce
  - Tompkins County Funders Group
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## Welcome

Thank you for establishing a Donor Advised Fund (DAF) with the Community Foundation of Tompkins County. We are honored to partner with you and encourage you to explore the full range of programs, expertise, and services designed to support your philanthropic goals. Donor Advised Funds offer individuals, families, and businesses a flexible and informed way to give back. This handbook provides an

overview of how your fund works, outlines our policies, and answers common questions. Our goal is to make your philanthropic experience meaningful, rewarding, and straightforward. Our team is readily available by phone, email, or in person to provide guidance and ensure a seamless giving experience.

We also offer additional types of funds to meet your changing philanthropic goals. Please contact us if you would like more information about field of interest funds, agency designated funds, and/or operational funds.

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## Why Donors Choose the Community Foundation

- **Trusted Asset Management:** Since 2000, we have responsibly managed millions of philanthropic dollars and currently oversee more than \$31 million in assets.
  - **Flexibility with Purpose:** Enjoy the tax advantages of a public charity combined with the involvement and personalization of a private foundation.
  - **Cost-Effective Giving:** Shared services allow donors to benefit from professional staff and expert investment advisors at lower cost.
  - **Convenience:** We handle due diligence, grant processing, reporting, and recordkeeping—making charitable giving easy.
  - **Community Expertise:** Our staff brings decades of combined experience across education, health, arts and culture, sustainability, social justice, and more.
  - **Clear Reporting:** Donors receive personalized fund statements and regular updates on fund activity.
  - **Complete Giving History:** We maintain detailed records of all contributions and grants, giving you easy access to your philanthropic history.
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## Fund Types and Status at a Glance

- **Donor Advised Fund:** You (or your designee) recommend grants to qualified charities; the Foundation provides oversight and final approval.
- **Field of Interest Fund:** Supports a specific charitable area; grants are recommended by a distribution committee defined in the fund agreement.
- **Designated Fund:** Provides ongoing support to one or more named organizations.
- **Agency Fund:** Assets held and invested on behalf of a nonprofit organization.

**Minimum Funding Levels** - Donor Advised (Endowed): \$10,000 - Donor Advised (Expendable): \$20,000 - Field of Interest, Agency, or Designated (Endowed): \$20,000

**Fund Status [endowed or expendable]** - Endowed funds are permanent and provide support in perpetuity. Expendable funds are designed for more immediate charitable use. Typically, 4% of these funds are available annually for grantmaking. Expendable funds are designed for more immediate charitable use.

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## Establish and Fund Your Donor Advised Fund

All funds are established through a fund agreement between the donor and the Community Foundation. Contributions are irrevocable and qualify for charitable tax deductions, subject to IRS limitations.

We accept a wide range of assets, including: - Cash, checks, and online gifts - Publicly traded stocks, bonds, and mutual funds - Other assets (such as real estate or closely held business interests), subject to review. Please consult our Gift Acceptance Policy.

We encourage consultation with professional advisors regarding tax or legal implications of charitable gifts.

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## Using Your Donor Advised Fund

As a fund advisor, you are an active partner in our work. We welcome your insights into community needs and are happy to share grant opportunities and initiatives aligned with your interests.

### Accessing Your Fund Online

Log into the Fund Advisor Portal at: <https://cftc.fcsuite.com/erp/portal/>

You may also find the link to the Fund Advisor Portal at the footer of Community Foundation's website. Navigate to Community Foundation's homepage ([www.cftompkins.org](http://www.cftompkins.org)), click on Community Foundation Fund Advisor Portal in the footer banner at the bottom of your screen. In the footer, please find the link Fund Advisor Portal in the right-hand corner, under Make A Gift button.

### Recommending Grants

Grant recommendations may be submitted online (via Fund Advisors Portal), by email, or in writing. Please include the grantee's name, grant amount, and purpose. Minimum grant amount: \$200.

Eligible grantees include qualified 501(c)(3) public charities, schools, government entities, and faith-based organizations. Grants may not be made to individuals, to satisfy personal pledges, or to provide personal benefit.

All grant recommendations are subject to due diligence and final approval by the Community Foundation.

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## A Few Things You Should Know Before Making Grant Recommendations

Before submitting a grant recommendation, we encourage you to review the guidelines below. These policies help ensure compliance with IRS regulations and protect both you and the Community Foundation.

### Eligible Grantees

You may recommend grants to the following organizations: - 501(c)(3) public charities\*, schools, government entities, municipalities, and religious organizations anywhere in the United States (including U.S.-based offices of international organizations) - Private operating foundations (provided the foundation was not established by you or your family) - The Community Foundation of Tompkins County - Any other fund of the Community Foundation of Tompkins County

\*Please note: A small number of 501(c)(3) public charities are ineligible due to IRS regulations governing Donor Advised Funds. Our staff is always happy to assist with eligibility questions.

## Prohibited Grantees

Grant recommendations may not be made to: - Non-501(c)(3) organizations - Individuals, or for the benefit of an individual - Any entity if the purpose is not charitable - Any entity to satisfy a legally binding pledge of the donor, advisor, or related parties - Any entity from which the donor, advisor, or related parties will receive more than incidental benefits - Any entity for the purpose of supporting a political campaign - Private non-operating foundations - The fund's donor, advisor, or related parties in the form of a direct grant, loan, compensation, or similar payment

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## A Word About Pledges and Benefits

### Pledges

Occasionally, fund advisors wish to use their Donor Advised Fund to fulfill a pledge made to an organization. However, IRS regulations do not allow Donor Advised Funds to be used for this purpose.

An enforceable pledge occurs when a donor makes a written financial commitment to an organization and is legally responsible for fulfilling that commitment. From the IRS's perspective, using a Donor Advised Fund to satisfy such a pledge would result in an impermissible personal benefit.

By ensuring that fund advisors, their family members, and related entities do not use Donor Advised Fund grants to satisfy enforceable pledges, the Community Foundation protects you from potential IRS excise taxes equal to 125% of the benefit received. For example, a legally binding pledge of \$500 satisfied through a Donor Advised Fund could result in a \$625 excise tax to the donor, as well as penalties to the Foundation.

### Material and Incidental Benefits

Because donors receive charitable tax deductions for contributions to a Donor Advised Fund, the IRS does not allow donors to receive material benefits in return, such as event tickets, tables at fundraisers, or discounts on goods or services.

Incidental benefits may be permitted if their value does not exceed IRS limits (currently \$72 per person) and does not reduce the charitable benefit of the gift. Examples include small tokens such as mugs, key chains, newsletters, or light refreshments.

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## Amount Available for Grantmaking

Once an expendable fund has reached the minimum amount required to open, there is no ongoing minimum balance requirement.

For endowed funds, the Community Foundation seeks to: - Maintain the purchasing power of funds over time - Reduce year-to-year volatility in distributions

Each year, the Board of Directors determines the spending rate used to calculate grantable amounts. This rate typically ranges between 3% and 5% and is outlined in the Foundation's Spending Policy. The payout rate is applied to a multi-quarter trailing average of the fund's fair market value.

The amount available for grantmaking from endowed funds is reflected in your annual spendable amount report, distributed each February. New endowed funds must be invested for a full calendar year (Jan – Dec) before becoming eligible for distributions.

Endowed funds which due to market losses have dipped below their principal amount are not eligible to make grants until market gains return that fund to its principal amount.

There is no minimum balance requirement for expendable donor advised funds. We do require at least one grant be made at least once every three years.

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## Board Responsibilities and Grant Approval

All grant recommendations are presented to the Community Foundation’s Board of Directors. The Board has authorized the Chief Executive Officer to approve grants of \$25,000 or less. Grants exceeding \$25,000 require Board approval.

Please consult with Foundation staff regarding deadlines, especially for time-sensitive grant requests.

Foundation staff are available to help identify nonprofit organizations aligned with your charitable goals and to provide research or background information upon request.

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## Due Diligence

Upon receipt of a grant recommendation, Foundation staff conduct due diligence to confirm that the organization is a qualified charitable entity. This review must be completed before a grant is submitted for approval.

Grant recommendations may be made to organizations outside Tompkins County, New York, and the United States. For international grants, the recipient organization must have a U.S.-based office through which the grant can be made.

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## Grant Awards and Recognition

Once approved, the Community Foundation sends an award letter and grant agreement to the recipient organization via email. Upon receipt of the signed agreement, grant checks are mailed or sent electronically via ACH.

At your discretion, grant award letters may include your name, your fund’s name, and the intended use of the grant. Anonymity is always respected and may be requested on the grant recommendation.

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## IRS Regulations

While Donor Advised Funds offer flexibility, certain restrictions apply. In accordance with IRS regulations, grants may not be used to: - Fulfill personal pledges - Pay membership dues or fees that provide donor

benefits - Provide any direct benefit to a donor or fund advisor - Support a named individual. For questions regarding restrictions or compliance, please contact Community Foundation staff.

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## Grant Cycles and Opportunities

The Community Foundation periodically invites fund advisors to participate in competitive grant cycles. Information about these opportunities will be shared via email.

Materials may include: - Grant cycle priorities - Summaries of funding requests - Funding options using Donor Advised Funds or other charitable vehicles

Through the Community Grants Program, staff and volunteers review proposals and conduct site visits with select applicants. We are happy to share potential grant opportunities that align with your philanthropic interests and help you stay informed about evolving community needs.

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## Philanthropic & Donor Services

Beyond managing the administrative details of your fund, the Community Foundation is here to support you as a thoughtful, engaged, and effective philanthropist. We offer opportunities for you—and your family—to learn, connect, and grow through personalized advising, educational programs, and community events.

### Connect With Our Mission-driven Sector

Our staff maintains close relationships with mission-driven organizations throughout Tompkins County and beyond. We are happy to gather information about organizations or issue areas that interest you and to help you explore potential funding opportunities.

Visiting an organization or the communities it serves is often one of the most meaningful ways to understand its work. We can help arrange partnership engagement visits, suggest questions to ask mission-driven leaders, and offer guidance as you assess alignment, impact, and long-term sustainability.

### Partner With Community Foundation Initiatives

The Community Foundation leads and supports a range of initiatives focused on building a stronger, more equitable community. With your Donor Advised Fund, you may choose to partner with efforts such as early childhood and parenting education, youth mentoring and leadership, social justice, environmental education, and other community priorities. Our staff can share current initiatives and discuss ways your philanthropy can help advance this work.

### Learning & Networking Opportunities

Throughout the year, the Community Foundation hosts conversations, briefings, and events designed to inform and connect donors. These gatherings offer opportunities to learn from mission-driven leaders, community partners, and fellow fund advisors.

Programs such as *Let's Talk*, part of our Listening and Learning Series, offer live online conversations to hear from local leaders, explore critical community issues, and learn from one another.

## Learn Together

As a fund advisor, you have access to a broad network of mission-driven, public-sector, and community leaders, as well as research and resources that can inform your giving. Attend our annual Fund Advisors Briefing. Our staff is always glad to facilitate introductions or conversations with experts working across many areas of community life.

## Family Philanthropy

Many fund advisors use their Donor Advised Funds to engage children, grandchildren, or other family members in giving. When the time is right, Community Foundation staff can work with you to clarify shared values, develop a family giving statement, and establish goals that guide future grantmaking—helping build a lasting tradition of generosity.

## Research & Community Insights

To support informed philanthropy, the Community Foundation regularly produces and shares research on issues affecting our region. Past reports have focused on topics such as children and families, education, and charitable giving in Tompkins County and New York State.

## NY Funders Alliance

As a Community Foundation of Tompkins County fund advisor, you are also a member of the New York Funders Alliance (NYFA), a statewide network serving the philanthropic community. NYFA offers learning opportunities, convenings, and resources designed to strengthen effective philanthropy. We are happy to share information about upcoming events and membership benefits.



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## Fund Management

### Adding to Your Fund

You may add to your fund at any time. Other donors may also make a gift to your fund as advisors often offer to their family and friends as a way of honoring their interests and giving. The Community Foundation accepts contributions by cash, check, stock transfer, wire transfer, and online gifts.

Checks should be made payable to **Community Foundation of Tompkins County** and mailed to our Ithaca office, with your fund name noted. Stock gifts require advance coordination; please contact staff for transfer instructions so we may work directly with your broker. Tax acknowledgments are provided for all gifts.

Anyone may contribute to your fund. Advisors are notified of the donor name, amount, and date of gift.

## Year-End Giving

Many donors choose to make contributions at year-end. If you plan to make a stock gift in December, please contact us early to ensure timely processing. We can provide account information and assist with coordinating transfers.

## Fund Inactivity

Donor Advised Funds are considered inactive if no grant recommendations are made for three consecutive years. Contributions alone do not constitute activity. If a fund becomes inactive and we are unable to reach the advisor, the Board may exercise its variance power to transfer the fund balance to support the Foundation's unrestricted grantmaking.

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## Fund Expenses & Investment Management

### How Your Fund Supports Our Community Impact

Administrative and investment fees help support the Foundation's core services, including philanthropic advising, grantmaking, mission driven capacity building, asset management, and community leadership.

### Philanthropic Services Assessment

Each fund pays a proportional share of administrative expenses, deducted monthly: - 2.00% on invested balances under \$50,000 - 1.50% on invested balances of \$50,000 and above - Annual minimum fee: \$150 - Interest earned on cash balances is swept to support operations

### Investment Management Fee

Investment management costs are allocated proportionally and reflected net of fees:

- 0.30% for Plans A, B, and C

- 0.28% for Plan D (ESG)

### Investment Program & Options

The goal of the investment program is to achieve a total rate of return that will allow the Foundation to respond to today's needs and provide for long-term growth for future needs. The investment strategies are available for both endowed and expendable funds. Refer to the Investment Policy Statement for additional detail. Find online at [cftompkins.org](http://cftompkins.org) under Resources and then the [Policies tab](#).

Upon making a gift to the Community Foundation, donors give up all rights, title, and interests to the contributed assets in exchange for receiving a tax deduction at the time of donation. Donors cannot choose investments, investment managers, or brokers. Donors are allowed advisory privileges with respect to fund investment options. The Community Foundation currently offers four different fund investment options.

Endowed (permanent) funds exist to provide a perpetual resource for charitable purposes. The investment objective of permanent funds is preserving the long-term, real purchasing power of assets while providing a relatively predictable and growing stream of annual distributions in support of the Foundation.

Expendable funds provide a temporary charitable asset. The investment objective of nonpermanent funds, that is, funds that are wholly expendable, is to preserve capital and, if possible, purchasing power over the life of the fund.

The investment program is designed to balance current grantmaking needs with long-term growth. Endowed funds focus on preserving purchasing power while providing reliable distributions; expendable funds emphasize capital preservation over their intended lifespan.

Available allocation models include: - Plan A (65% equity / 35% fixed income) - Plan B (80% equity / 20% fixed income) - Plan C (40% equity / 60% fixed income) - Plan D (ESG) (65% equity / 35% fixed income)

### Fund Investment Pool Allocation Models

The majority of Community Foundation funds are invested in the investment pool with the four different asset allocation models available, comprised of equity holdings and fixed income holdings. ESG (environmental, social and governance) pool uses a set of standards for screening investments based on a set of environmental, social, and governance criteria. (see appendix for portfolio performance and asset allocation).

<b>Asset Allocation</b>	<b>Equity</b>	<b>Fixed Income</b>
<b>Plan A (65/35)</b>	65%	35%
<b>Plan B (80/20)</b>	80%	20%
<b>Plan C (40/60)</b>	40%	60%
<b>Plan D [ESG] (65/35)</b>	65%	35%

### Cash and Cash Equivalents

Cash and cash equivalent assets are highly liquid and not subject to significant fluctuations in value. Expendable funds are often held in cash equivalent instruments; they may also be invested in the investment pool. There are no fees associated with us holding your gifts in these types of assets. Any interest earned is swept to the foundation. Having your gifts held in cash or cash equivalents means that any gains come only from additional gifts into the fund. These assets do not benefit from market gains nor are they exposed to market losses.

### Oversight

The Financial Administration Committee oversees investment performance and policy, working closely with professional advisors and reporting regularly to the Board of Directors.

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## The Future of Your Fund

### Your Legacy

We are committed to honoring your charitable intent. Your grantmaking history is tracked and available for review, and staff is happy to help you reflect on past giving or explore future adjustments.

### Succession Planning

When establishing your fund, you may name successor advisors or choose a future distribution plan. Options include: - Naming successor advisors - Transferring assets to Tompkins Today and Tomorrow Funds - Supporting Community Foundation operations or endowment - Converting to a field of interest or designated fund

### Planned Giving & Legacy Society

Planned gifts allow donors to create lasting impact while achieving personal and financial goals. Those who include the Community Foundation in their estate plans are invited to join the Legacy Society, which recognizes and celebrates this commitment to the future of our community.

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## Stewardship, Oversight, and Compliance

The Community Foundation's Board of Directors oversees all grantmaking and investments. Staff conduct due diligence on every grant recommendation to ensure compliance with IRS regulations and Foundation policies.

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## Looking Ahead: Your Legacy

Your Donor Advised Fund can extend your values well into the future. You may name successor advisors, establish long-term charitable priorities, or designate how your fund will be used after your lifetime.

Options include supporting Community Foundation initiatives, converting to a designated or field-of-interest fund, or contributing to unrestricted grantmaking that addresses evolving community needs.

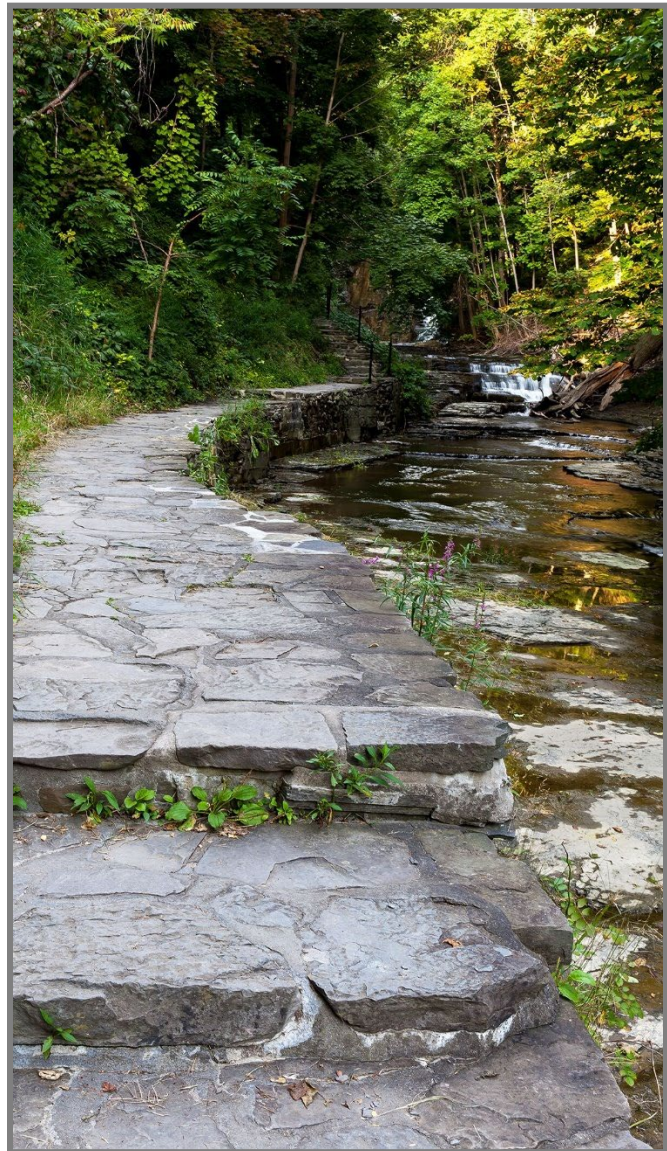
## Community Foundation History: Philanthropy Magnified



Today, more than 850 Community Foundations operate in the United States. The first Community Foundation was formed more than 100 years ago. With such a long history and widespread acceptance, community foundations are still gaining popularity and new audiences throughout the country.

In 2000, six local leaders served as the incorporating board of the Community Foundation of Tompkins County and appointed one full-time executive director and one part-time assistant. Special thanks go to early, forward thinking individuals at Atlantic Philanthropies, Cornell University, Ithaca College, Park Foundation, Triad Foundation, and the United Way of Tompkins County for making investments in the Community Foundation.

Celebrating its 25<sup>th</sup> year in 2025, the Foundation has matured responsibly since its beginning. In this period, \$55 million in gifts have been raised and awarded more than \$37 million in grants. A strong measure of commitment to the Foundation's future is the board decision to invest financial and personnel resources to embrace the demand for increased civic engagement and to serve donors more comprehensively.



## Frequently Asked Questions

### **How do I know how much is available for grantmaking from my fund?**

For endowed funds, you will receive an annual statement each February showing the amount available for grantmaking for the year. Statements are distributed quarterly, and you may also view balances and activity through the online fund advisor portal. Our staff is always happy to help answer questions.

### **Is there a minimum grant amount?**

Yes. The minimum grant recommendation is **\$200**, which helps ensure efficient processing.

### **How often should I recommend grants?**

You may recommend grants at any time, as often as it fits your philanthropic goals and plans.

### **Can I use my fund to pay a pledge or membership?**

No. IRS regulations do not allow Donor Advised Funds to be used to satisfy personal pledges, memberships, dues, or any expense that provides a personal benefit to the donor or advisor.

### **What types of organizations are eligible to receive grants?**

You may recommend grants to qualified nonprofit public charities, schools, government entities, and religious organizations.

### **Can the Community Foundation help me identify organizations to support?**

Yes. Our staff can suggest organizations aligned with your interests and provide research or background information to help inform your grantmaking.

### **May I recommend grants outside Tompkins County?**

Yes. Grants may be made outside the county, including nationally. International grants are possible when the organization has a U.S. base and qualifies under U.S. charitable guidelines.

### **How are grants distributed and acknowledged?**

Once approved, grants are sent to recipient organizations with an award notification. You will receive confirmation of all grants made from your fund.

### **May I give anonymously?**

Yes. You may request anonymity when submitting your grant recommendation.

### **Can I involve my children or grandchildren in my philanthropy?**

Absolutely. We can help engage family members as advisors and support multigenerational giving.

### **Can I recommend a grant to an individual?**

No. Grants may only be made to qualified organizations, not to individuals.

### **May I recommend a grant to an organization where I serve on the board?**

Yes, as long as you receive no personal benefit and do not exert undue influence over the use of the grant.

### **Can my fund support advocacy work?**

Yes. General support grants may be made to organizations engaged in advocacy or lobbying. However, grants may not support political candidates or campaigns.

### **Does the Community Foundation support mission-driven organizations beyond grantmaking?**

Yes. We offer nonprofit support through technical assistance, convenings, learning opportunities, and online resources.

## Community Foundation Staff



**George P. Ferrari, Jr.**

Chief Executive Officer

(607) 272-9333 [gferrari@cftompkins.org](mailto:gferrari@cftompkins.org)

Contact George for making a gift or bequest, to work with your professional advisor, to begin the process of opening a new fund, to learn more about programs such as the Transfer of Wealth Study.



**Gloria Coicou**

Chief Engagement, Equity & Grants Officer

(607) 272-9333 [gcoicou@cftompkins.org](mailto:gcoicou@cftompkins.org)

Contact Gloria for specific questions about grant cycle and off cycle processes, Grant Reviewer opportunities, for questions about Partnership Collaboration Visits and Let's Talk sessions.



**Amy LeViere**

Chief Philanthropic Services & Systems Officer

(607) 272-9333 [aleviere@cftompkins.org](mailto:aleviere@cftompkins.org)

Contact Amy for philanthropic services and resources, questions on the Fund Advisor Portal, fund statements, grant recommendations, making gifts of stock, events, including the Annual Fund Advisors Briefing.



**Steph Bailey** (*picture coming soon, joining staff 2/9/26*)

Chief Development Officer

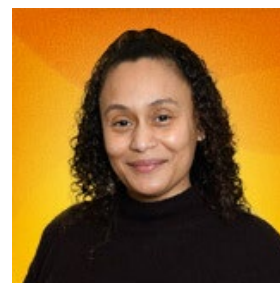
(607) 272-9333 [sbailey@cftompkins.org](mailto:sbailey@cftompkins.org)

**Nancy Massicci**

Chief Development Officer

(607) 272-9333 [nmassicci@cftompkins.org](mailto:nmassicci@cftompkins.org)

Contact Nancy to make an annual or major gift or planned gift, become a Legacy Society member or join the HEROES Circle, to learn options for creating a greater impact, and for the TTT Endowment Initiative.

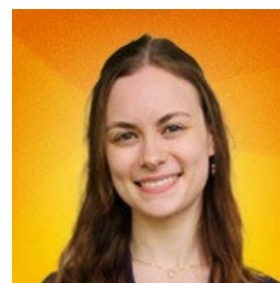


**Madeline Rosas**

Administrative Manager

(607) 272-9333 [mrosas@cftompkins.org](mailto:mrosas@cftompkins.org)

Contact Madeline as your first point of contact, to inquire about the status of pending grants, for general questions about our calendar of events, and to request specific forms to be emailed or sent by the USPS.



**Ava Bashant**

Development Assistant

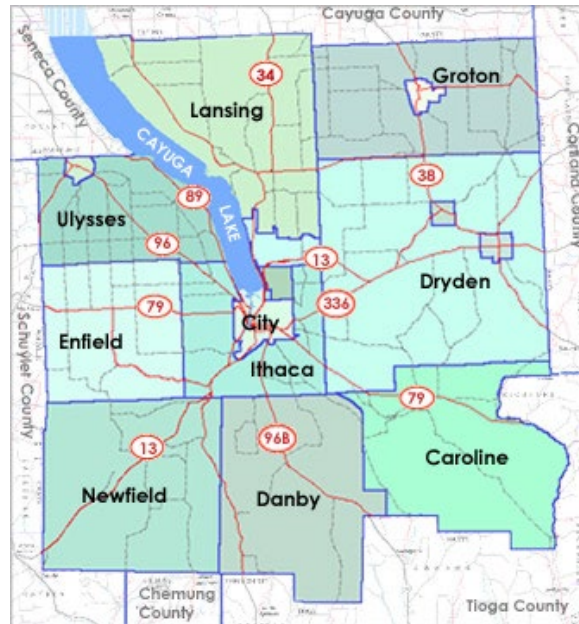
(607) 272-9333 [abashant@cftompkins.org](mailto:abashant@cftompkins.org)

Contact Ava for more information regarding the Tompkins Today & Tomorrow (TTT) Endowment Initiative, also general questions and inquiries regarding social media platforms and communications.

## Our Commitment to You

We are grateful for your generosity and honored to steward your philanthropy. The Community Foundation of Tompkins County is committed to transparency, responsiveness, and partnership—today and for generations to come.

For questions or assistance, please contact our staff by email or visit [www.cftompkins.org](http://www.cftompkins.org).



VISION: Tompkins County thrives thanks to engaged philanthropy.

MISSION: bring people and resources together to build a more equitable Tompkins County by inspiring diverse philanthropy, catalyzing collaborations and championing inclusion and justice.

Community Foundation of Tompkins County  
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(607) 272-9333

Visit our website to stay current on Community Foundation activities, events, and news.

[www.cftompkins.org](http://www.cftompkins.org)

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