



**CalPoly**  
**Pomona**

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PLANNED GIVING BRIEF

# CAL POLY POMONA DONOR ADVISED FUNDS

## INVESTING FOR THE FUTURE

A Donor Advised Fund is like having your own foundation. The fund is invested for growth, permitting you to make annual gifts of income and principal while you are alive. When you pass away, your heirs may make recommendations for

distributions from the fund for a number of years. If you establish a Donor Advised Fund with Cal Poly Pomona, the fund balance will become an asset of the university at the end of the term.

## DONOR ADVISED FUNDS—THE GIFT THAT KEEPS ON GIVING

How would you like to make a gift today that would enable you and your loved ones to continue to make charitable gifts in the future? When you make a gift to us of cash or other assets, we take your tax deductible contribution and establish a special account in your name. Your account is then invested to grow over time, permitting you to recommend annual gifts to Cal Poly Pomona.

## IT'S EASY TO GET STARTED

Opening a DAF account is easy to do. Simply contact us for an application form and complete and sign the fund agreement. You may fund your account with a gift of cash, or securities. Check with us if you have unique or special assets that may be donated in a tax efficient way. Call or Email today!

## A FLEXIBLE, LOW COST ALTERNATIVE TO A PRIVATE FOUNDATION

A Donor Advised Fund (DAF) offers you a flexible and easy-to-establish vehicle for charitable giving. Unlike private foundation (PF) gifts, DAF gifts generally qualify for a full fair market value charitable deduction and our DAF has no startup costs. A DAF also permits you to make grants to us without the unfavorable PF restrictions and excise taxes.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

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## RECOMMENDING YOUR GIFTS TO CAL POLY POMONA

Once your account is open, you are ready to begin giving! Simply contact us in writing with your annual recommendations of how your DAF funds should be distributed. While we may not be legally obligated to distribute your funds as you desire, we seek to honor your wishes to help further Cal Poly Pomona and causes you love.

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