

OPEN A DONOR ADVISED FUND

at the San Francisco Foundation

A donor advised fund makes it easy to support the causes you care about in the Bay Area, across the United States, and around the world. As a resource for philanthropy, we work with individuals, families, foundations, and businesses to support your giving goals. We offer philanthropic advice, personalized giving strategies, and learning opportunities to ensure that your experience is rewarding and your giving is impactful.



GIVE

- **OPEN** your fund with a charitable contribution of \$10K or more, and qualify for an immediate tax deduction
- **CONTRIBUTE** cash, securities, or complex assets, such as real estate and closely held stock
- **ADD** to your fund anytime

GROW

- **SELECT** from a variety of investment options and watch your charitable dollars grow
- **RECOMMEND** an outside investment manager for funds valued at \$2.5M+
- **MAXIMIZE** your charitable dollars with our competitive investment performance

GRANT

- **SUPPORT** 501(c)(3) nonprofits of your choice anytime
- **ACCESS** information about your fund and recommend grants 24 hours/day on our online portal
- **PARTNER & PLAN** with our expert staff to develop your giving strategy
- **INVOLVE** generations of family members in your giving if desired

ANNUAL FEES

Because we are a public charity, administrative fees support the foundation's commitment to building a better Bay Area. Fees are charged directly to our donors' funds. We charge an annual support fee based on a tiered schedule for a blended, effective rate. Investment management fees are assessed by individual managers, and fluctuate over time as market values change.

- **First \$0-\$3 million** 1.00%
- **Next \$3-\$10 million** 0.75%
- **Next \$10-\$25 million** 0.50%
- **Next \$25 million** 0.25%
- **Minimum annual fee** \$500

Founded in 1948, The San Francisco Foundation is a community foundation with deep roots in the Bay Area as a philanthropic resource, social justice funder, and civic leader. Our donors share our commitment to and love for our region. And they have the power to invest in a better Bay Area and beyond.



**San Francisco
Foundation**

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