



Establishing a Fund

It is easy to establish your own named charitable fund, and it can be done in less than a day. Working with a member of our staff, and your financial advisor if you choose, take these simple steps:

1. Determine your charitable purpose or intent.
2. Select the type of charitable fund that best supports your purpose; we will outline options and advantages of each.
3. Complete a governing document that clearly states your charitable intentions.
4. Select a name for your fund. You may use your name, a family member's name, the name of a favorite cause, or choose a name that allows you to remain anonymous.
5. Depending on the type of fund you establish, you may designate fund advisors such as yourself and spouse or children. If your fund type is Community Grants, Incurage will be the fund advisor for you.
6. Make an establishing gift; refer to our Gift Acceptance Policy for details. You can receive a tax deduction for your first gift and each additional contribution to the fund.

Once established, enjoy giving through your fund.

- Add to the fund at any time in any dollar amount.
- Specify how you want grants to be acknowledged – in the name of your fund or anonymously.
- If your fund type is Donor Advised, you may recommend distributions to qualified charities, locally or throughout the United States.

To learn more, please contact Donor Services staff at 715.423.3863 or hello@incuragecf.org

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community foundation

www.incuragecf.org

