

The Stewardship Fund: A Catholic Donor Advised Fund

"They shall not appear before the LORD empty-handed, but each with his own gift, in proportion to the blessing which the LORD, your God, has given to you." – Deuteronomy 16: 16-17

Prayer Reflection:

Lord, help me to be a faithful steward. Let me use the resources You've blessed me with in ways that honor You and bless others.

Your Mini-Foundation Rooted in Faith

A Donor Advised Fund allows you to:

- Utilize a flexible, simple tool to manage and maximize your giving.
- Simplify your annual and lifetime charitable giving.
- Make a single or recurring gift to support multiple charities.
- Grow your gift tax-free while being invested in a socially responsible way in accordance with Catholic values.
- You'll have the ability to name your fund (*and retain your ability to give anonymously*) without having to establish a private family foundation.



How Does a Donor Advised Fund Work?

1

Your gift of \$5,000 or more establishes the fund in your name, the name of a loved one, or any name of your choice.

2

The fund will remain open as long as there is a balance of \$1.

3

You can add to the fund at any time.

4

It's your own mini-foundation without the hassle and administrative fees.

5

The fund is invested in a Catholic-compliant portfolio to grow over time.

6

You can make gifts to multiple Catholic-compliant organizations while you are alive through our 24/7 fundholder portal.

DONOR



Cash or Appreciated Securities



Capital Gains Tax Avoidance and Income Tax Deduction

DONOR ADVISED FUND



Investment Management



Grant over time at your convenience

CHARITIES



Ways to Create Your Stewardship Fund

“Things in life change. The Catholic Foundation of Central Florida Donor Advised Funds give you the flexibility to manage, direct, and decide in a timely manner where the greatest needs may be...not only today, but in the future!”

Kevin Bowler | Ormond Beach



Give Over Time

Build your Stewardship Fund gradually with recurring contributions at a pace that fits your budget and your charitable goals. You can recommend grants as you're ready, and involve your family in choosing ministries to support, creating a shared tradition of faithful giving.



Include a Gift in Your Will

You can ensure your generosity continues beyond your lifetime by naming your Stewardship Fund in your will or estate plan. You may also name a successor advisor, such as a child or grandchild, to carry on your charitable wishes and pass your values on to the next generation.



Give as a Group

Families, parishes, or small communities can establish a Stewardship Fund together, combining resources to maximize impact. It's a meaningful way to increase your charitable impact and invite others to participate in a shared legacy of faith-filled giving.

What Can You Use to Fund Your Stewardship Fund?

- Cash - May be eligible for charitable tax deductions.
- Stock - May be eligible for double tax savings: no capital gains tax and charitable tax deduction.
- Donor Advised Fund Grant – Yes, you can transfer dollars from another DAF to establish a Catholic Stewardship Fund.
- A gift in your will or trust
- Beneficiary designation (i.e. IRA, Annuity, Life Insurance Policy, etc.)

Create a Stewardship Fund Today

Contact one of our Charitable Giving Advisors today at **(407) 246-4889** to start your fund and experience the joy of watching your dollars grow as it transforms lives and creates lasting impact on the ministry you love.

Scan to visit:
cfocf.org/DAF

