Community Foundation Boulder County

Donor-Advised Fund DOs and DON'Ts

We believe in helping you reach your philanthropic goals

Since 1991, Community Foundation Boulder County has advised hundreds of local donors and supported their giving to meet the evolving needs of our community. Through close collaboration with Donor-Advised Fund (DAF) holders like you, we help make sure your generosity goes further to support your favorite organizations and the work they do to help all those who live and work in Boulder County and beyond.

By following the DOs and DON'Ts of DAFs, you can maximize your giving while ensuring your charitable activity remains federally compliant and aligned with community needs.

- ✓ Support qualified charitable organizations
- ✓ Recommend unrestricted or program-specific grants
- ✓ Utilize our foundation expertise and research services
- ✓ Strengthen communities with thoughtful philanthropy

Donor-Advised Funds at CFBC May Be Used For:

- IRS-qualified 501(c)(3) public charities
- Schools, universities, and educational institutions
- Churches and faith-based organizations
- Hospitals and medical research organizations
- Government entities serving charitable purposes
- Community-based charitable programs and initiatives
- Private operating foundations

Donor-Advised Funds at CFBC May Not Be Used For:

- Grants to private (non-operating) foundations
- Grants to specific individuals
- Scholarships designated for named individuals
- Political campaigns, candidate support or lobbying activities (501(c)(4) organizations)
- Pledges or obligations to an organization
- Loans or compensation payments
- Grants that violate federal, state or local law
- Grants that create direct or indirect benefits for donors, donor advisors, family members, businesses they control, or other related parties

Examples of Prohibited Donor Benefits Include:

- Event tickets, gala tables, raffle tickets or auction purchases
- Membership, registration, or board dues and fees
- Merchandise discounts, meals or preferred seating
- Sponsorship opportunities with advertising or other prohibited benefits
- Reimbursement for personal or volunteer expenses

Please Note:

If your request is related to attending a gala, event, or participating in a paddle raise in which you received no benefits, please include the following language in your memo to ensure smooth grant processing:

No goods or benefits were received and this is a nonbinding commitment.

If you have any questions, please reach out prior to making your grant.

Please email **philanthropicservices@commfound.org** or call **(303) 442-0436**

Thank you for your partnership as we work to create a community where everyone can thrive.

Community Foundation Boulder County | 1123 Spruce Street, Boulder, CO 80302