CCUSA Donor-Advised Fund

Catholic Charities USA (CCUSA) is pleased to launch The CCUSA Donor-Advised Fund (DAF). This donor-friendly giving tool enables you to support organizations whose mission is consistent with your Catholic faith, while becoming eligible for immediate federal tax benefits. Liquid funds in your DAF will be invested in socially responsible investments selected based on Catholic Social Teaching until grants are made from your DAF account.

Catholic Charities USA

Each year CCUSA serves nearly 10 million people who live in poverty or are members of vulnerable populations across the United States and its territories, regardless of their faith.

We bring hope to individuals and families who are desperately in need. People across the United States and its territories know that when they need help, Catholic Charities is there to help them.
The CCUSA DAF is a charitable gift account that allows you to recommend grants to your favorite charities over time while enjoying immediate tax benefits by fully deducting your contributions in the year they are made. Accounts may be established with cash, securities and other noncash assets such as real estate and privately held shares. While the Internal Revenue Service requires that you no longer control the funds once they are donated to the DAF, you may advise CCUSA as to which organizations you would like to receive grants. You may name your account (e.g. the Smith Family Charitable Giving) and name successor advisors, such as your children, who can carry on your charitable legacy beyond your lifetime. At the same time, you will be supporting organizations whose mission is consistent with your faith.

**The Donor-Advised Fund**

One: The CCUSA DAF has a **minimum initial contribution** of $2,500, which is lower than most donor-advised funds.

Two: The **full fair market value** of appreciated assets, such as appreciated securities, and complex assets, such as real estate and partnership interests, can be deducted from your taxable income and you may avoid capital gains liability, allowing you to increase your giving ability.

Three: Your contributions are **invested in one or more socially responsible investment funds consistent with Catholic Social Teaching** under the professional management of UBS, enabling your contributions to compound over time and expanding your ability to make more grants in the future.

Four: You will receive **personalized customer service.** CCUSA will endeavor to learn what areas are of greatest interest or concern to you and can support you in identifying charities that align with your charitable goals.

Five: You will enjoy **easy online access** to manage all aspects of your charitable giving. You will receive quarterly consolidated reports showing all contributions and grants made from your account.

---

1 Subject to the approval of CCUSA.
2 Note that donations of complex assets have additional rules and restrictions.
3 An administrative fee equal to 1.00% of the account balance will be charged. Fees will be reviewed periodically and may be adjusted from time to time. Fees are based on an average daily fund balance and withdrawn from the fund on a quarterly basis. Administrative fees do not include underlying investment fees, asset custody fees or fund unitization.