

Partners in Philanthropy

The Donor Advised Fund Newsletter Spring 2023



Welcome to Partners in Philanthropy, the inaugural issue of **Catholic Charities USA's Donor Advised Fund Newsletter**. We look forward to hearing your feedback on this issue and future issues.

"God is so good!! Please let the DAF owner of this amazing gift know how much we appreciate their generosity. Catholic Charities of North Louisiana is committed to helping the neediest in our community, but we cannot do it alone. This incredible gift allows us to provide much-needed assistance to people seeking help in their most desperate times of need."

Meg Goorley

Executive Director

Catholic Charities of North Louisiana

The CCUSA Donor Advised Fund (DAF) is a philanthropic vehicle that allows owners to make a charitable contribution to establish a DAF and receive an immediate tax deduction. DAF owners can then recommend grants to their favorite charities over time and contribute to their DAF as often as they like.

Did you know...

- The minimum dollar amount to open a CCUSA DAF is \$1,500.
- The minimum dollar amount to make a grant to your favorite charity is \$50.
- You may design your own investment strategy for the assets in your DAF account by allocating amounts across four investment funds that are professionally managed.
- The investments in the CCUSA DAF pass the Catholic Values Screen.
- You can select your own unique name for your DAF.

DAF Do's and Don'ts

Do's

Scholarships. Owners can make grants to an existing scholarship fund. They can also start a new scholarship fund at any eligible charitable organization.

Pledges. Owners can make a grant to a charity for a multi-year commitment that is not treated as a legally binding pledge.

Family Members. Owners can name up to four designated individuals as successors on their account.

Don'ts

Scholarships. Owners cannot grant to scholarships where the donor or any family members may be eligible recipients. Grants cannot be used to pay the tuition of a specific individual.

Pledges. Owners cannot make grants to fulfill a pledge.

Family Members. Grants cannot benefit a specific person.

Political Parties. Grants cannot be made to candidates or to private, non-operating foundations.

"Once we learned about donor advised funds, it became clear that it was something we wanted to do. At first the tax advantages were much of the driving force, but ultimately we saw it as a way to more easily continue making charitable contributions in our retirement years when we would be on a fixed income. With the DAF, we are confident in our ability to make charitable donations in the future. Once we learned that Catholic Charities USA offered a DAF, it was an obvious choice for us to use them over a DAF with a for-profit entity."

Laura & Rob

DAF owners



2022 CCUSA DAF Grant Highlights



3.5M

distributed to



294

charities across



188

cities in



49

U.S. states/
territories

The 54 Catholic Charities agencies listed below were among the 294 charities that received grants in 2022. For the complete list of recipient charities, please visit our website.

[Catholic Charities Agency, Inc., Greensburg](#)

[Catholic Charities Bureau, Inc. Diocese of St. Augustine](#)

[Catholic Charities Diocese of Charlotte](#)

[Catholic Charities Diocese of Lexington](#)

[Catholic Charities Diocese of Monterey](#)

[Catholic Charities Diocese of Raleigh](#)

[Catholic Charities Diocese of Rochester](#)

[Catholic Charities Diocese of Tyler](#)

[Catholic Charities Diocese of Youngstown](#)

[Catholic Charities Maine](#)

[Catholic Charities of Acadiana](#)

[Catholic Charities of Brooklyn and Queens](#)

[Catholic Charities of Central & Northern Missouri](#)

[Catholic Charities of Central Colorado](#)

[Catholic Charities of Central Texas](#)

[Catholic Charities of Corpus Christi, Inc. Texas](#)

[Catholic Charities of Eastern Oklahoma](#)

[Catholic Charities of Gallup, Inc.](#)

[Catholic Charities of Idaho](#)

[Catholic Charities of Los Angeles](#)

[Catholic Charities of North Louisiana](#)

[Catholic Charities of Northwest Florida](#)

[Catholic Charities of Oregon](#)

[Catholic Charities of South Georgia](#)

[Catholic Charities of Southeast Michigan](#)

[Catholic Charities of Southern Minnesota](#)

[Catholic Charities of Southern New Mexico](#)

[Catholic Charities of Stockton, CA](#)

[Catholic Charities of the Archdiocese of Chicago](#)

[Catholic Charities of the Archdiocese of Newark, NJ](#)

[Catholic Charities of the Diocese of Arlington, Inc.](#)

[Catholic Charities of the Diocese of Fresno, CA](#)

[Catholic Charities of Wyoming](#)

[Catholic Charities Serving Central Washington](#)

[Catholic Charities USA](#)

[Catholic Charities West Virginia, Inc.](#)

[Catholic Charities, Archdiocese of Dubuque](#)

[Catholic Charities, Camden](#)

[Catholic Charities, Diocese of Peoria](#)

[Catholic Charities, Diocese of Trenton](#)

[Catholic Charities, Diocese of Venice, Inc.](#)

[Catholic Charities, Fort Wayne-South Bend](#)

[Catholic Charities, Gary](#)

[Catholic Charities, Inc. Diocese of Wilmington, DE](#)

[Catholic Charities, Inc. Jackson, MS](#)

[Catholic Charities, La Crosse](#)

[Catholic Charities, San Antonio](#)

[Catholic Charities, St. Thomas, VI](#)

[Catholic Social Services of the Upper Peninsula](#)

[Catholic Social Services, Columbus](#)

[Catholic Social Services, Fall River](#)

[Catholic Social Services, Pago Pago](#)

[Catholic Social Services, Rapid City](#)

[Karidat Catholic Charities, Diocese of Chalan Kanoa](#)

Q & A with DAF owner Jeanne from California

How long have you had your CCUSA DAF?

My CCUSA DAF was set up in early 2022, and I made my first grants in May of that year.

How did you hear about the CCUSA DAF?

I conducted an online search and learned that Catholic Charities funds many charitable endeavors. I also learned that I could use my required minimum distribution (RMD) from my IRA to make a qualified charitable distribution (QCD).

How many charities do you donate to annually?

I donate to 30 to 35 charities annually.

What made you set up your DAF with CCUSA and not another organization?

CCUSA shares my Catholic values. I was already a donor and was glad to know that CCUSA provided this service.

What do you like most about your CCUSA DAF?

My CCUSA DAF has reduced my check writing drastically! It also automatically provides me with the information I need each year for my tax returns. And I find the staff at CCUSA very helpful.

For more information about the **Catholic Charities USA Donor Advised Fund**, call **Francena Phillips Jackson** at 703.236.6206 or email fjackson@CatholicCharitiesUSA.org.

Maximize your Impact through the CCUSA Donor Advised Fund



Deposit

Open an account and contribute cash, appreciated assets or investments, including publicly traded securities.



Invest

Invest in one or more of our investment options and watch your charitable giving fund grow.



Donate

Recommend grants to qualified nonprofit charities of your choice.

To open a CCUSA Donor Advised Fund, visit ccusa.donorfirstx.com.

CCUSA does not provide financial or tax advice. Please consult with your financial or tax advisor before establishing a CCUSA DAF.



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Charities
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