



Dutchess County SPCA, Inc. Donor Advised Fund

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Establish your Donor Advised Fund by consulting your attorney and making an irrevocable, tax-deductible donation to the Dutchess County SPCA, Inc. and advise the investment allocation of the donated assets (any investment growth is tax-free).

Benefits of a Donor Advised Fund

1. Contributions are tax-deductible and any investment growth in the Donor Advised Fund is tax-free. It is also easy to donate long-term appreciated securities, eliminating capital gains taxes and allowing you to support multiple charities from one block of stock.
2. There is no cost to establish a Donor Advised Fund. However, there are often minimum initial charitable contributions to establish the Donor Advised Fund (typically \$5,000 or more).
3. Recommend grants to qualified public charities of your choice Main Advantages of a Donor Advised Fund
4. Simplicity – The Donor Advised Fund sponsor handles all record-keeping, disbursements, and tax receipts.
5. Flexibility – Timing of your tax deduction can be separate from your charitable decision making.
6. Family legacy – A Donor Advised Fund is a powerful way to build or continue a tradition of family philanthropy.
7. No transaction fees – Once approved, 100% of your recommended grant goes to your qualified public charity of choice.
8. Privacy if desired – Donors may choose to remain anonymous to the grant recipient.