

GIVE WHERE YOUR HEART LIVES

philanthropy@vermontcf.org  
(802) 388.3355  
opt.5



# Designated Fund

Designated funds let you support your favorite charities in perpetuity.

## This type of fund is for people who:

- Want to provide annual support in perpetuity for one or more of their favorite charities.
- Like the idea of partnering with the Vermont Community Foundation for ongoing investment and administrative management.



## Overview

When establishing a designated fund, donors specify one or more organizations to receive an annual distribution from the fund.

Your gift will provide a lasting legacy to help sustain your favorite nonprofit organization, and you can be confident in the Community Foundation's commitment to world-class investment stewardship.

Should the designated organization cease to exist, the Community Foundation will redirect the annual support to an organization that matches the mission of the originally-designated organization, ensuring that your generosity will continue to achieve the desired impact.

## How A Designated Fund Works

- You work with a philanthropic advisor to set up your designated fund, make a gift to the Vermont Community Foundation, and receive a charitable deduction.
- You choose a name for your fund, designate the organization(s) you want the fund to support, and select the investment pool option that is best suited to your goals. **Options: Long-Term Pool or Socially Responsible Pool.**
- We issue an annual distribution to the organization(s) you designated. If you prefer, the distributions can be made anonymously.
- To ensure we honor your philanthropic legacy, please note that designated funds cannot be changed once they are established.

[VERMONTCF.ORG/OUR-SERVICES](https://vermontcf.org/our-services)