

ARLINGTON COMMUNITY
FOUNDATION

**DONOR
ADVISED FUND**



A Donor-Advised Fund (DAF) at Arlington Community Foundation (ACF) is a partnership in giving with people who know you and your community. DAFs are a popular tool for managing giving. They enable you to maximize tax savings, minimize paperwork, and experience the joy of supporting the organizations that you care about.

Using an ACF DAF is simple. Make a gift of cash, stock, or other assets to establish your fund. Then, advise grants to specific charities—locally, nationally, and across the globe—as long as the organization is a qualified 501(c)(3) or other public entity like a school or municipality. At any time, you may direct ACF to make gifts from the fund through the online donor portal. Staff is also available to identify organizations that match your charitable interests. Additional gifts may be made to your DAF at any time.

What sets an ACF DAF apart from commercial DAF platforms?

A personal relationship. You always have access to a dedicated team member who knows you, your fund, and your goals.

Deep local knowledge, unlimited reach. We have deep knowledge of local nonprofits, but we also support you in your giving regionally, nationally, and even internationally.

Guidance when you need it. From complex assets to family giving conversations, we bring expertise that a self-service portal cannot offer.

Independence you can trust. As a community foundation, our decisions are guided by our mission and our donors, not outside pressure or corporate policy shifts.

Flexible gift planning options. In addition to DAFs, ACF offers other fund options including scholarships, field of interest funds, and designated funds. And we can administer gift vehicles such as charitable remainder trusts, charitable lead trusts, retained life estates, and more.

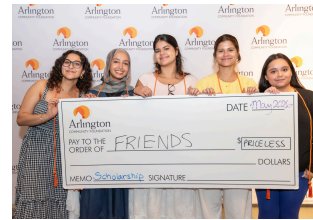
Legacy planning. Whether you want to involve your family in giving, leave a bequest, or create an enduring fund that outlives your lifetime, we have the expertise to help you create a charitable legacy that reflects your values and how you want to be remembered.

GETTING STARTED IS EASY.

Complete and submit an online new account form [here](#) or at arlc.org/daf. Review a draft agreement provided to you after receipt of the form. Sign the final fund agreement. Make your gift of cash, stock (transfer instructions [here](#) or at arlc.org/daf), or other assets. | Questions? Contact Christy Cole at ccole@arlc.org.

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HOLISTIC LEGACY PLANNING



The Arlington Community Foundation's (ACF) Holistic Legacy Planning helps you document all of your charitable intentions clearly, flexibly, and without adding complexity to your estate plan.

One plan covers everything. All of your charitable interests, local and beyond, are captured in a single Letter of Intent (LOI) held at ACF. No need to list every organization in your will or trust.

Your estate documents stay clean. With the LOI in place, you need only one charitable designation in your will or living trust: your legacy fund at ACF. The LOI handles the rest — directing specific distributions, multi-year giving, or gifts in perpetuity.

Make changes anytime. Your charitable priorities may evolve over time. The LOI can be updated or amended whenever you like with no need to revise your estate planning documents.

It's more than a plan, it's your story. You have the option to document your personal history, values, and vision for impact. Your LOI becomes a meaningful record of why you give, not just how.

A process tailored to you. ACF guides you through one or more facilitated conversations, supported by an optional self-guided legacy planning workbook. We work at your pace and meet your unique goals.

Ongoing stewardship. Your legacy plan is reviewed with you every couple of years to ensure it continues to reflect your current wishes.

“The more I talked to the ACF team, the more I fell in love with the idea of a legacy fund. The process was easy and super organized, and it made me think about things I may not have thought about. It helped me get real clarity.”

Dimple Dhabalia, ACF Legacy Society Member

READY TO GET STARTED?

Contact ACF to schedule a brief introductory meeting. We'll listen first and help you build a legacy plan that reflects *what matters most to you*.

Christy Cole

ACF Vice President

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