

## Donor-Advised Funds

### What they are

Donor-advised funds offer community engagement, flexibility, and access to the expertise of Hartford Foundation for Public Giving staff about grantmaking and the region's nonprofit community.

Each fund is assigned a Foundation staff liaison who provides various services including grantmaking advice, grant processing, quarterly fund statements, donor briefings, site visits (as appropriate), and an ongoing listing of small grant opportunities.

The minimum amount to establish a donor-advised fund is \$10,000 and donors may build up to that amount. Fees are charged at 1.00% up to \$500,000, after which fees decline based on a sliding scale.

### Experience worthy of your trust

Why consider a donor-advised fund at the Foundation? Our experience.

**Assets:** We manage 246 donor-advised funds with total assets of more than \$212 million. Currently 79 funds have assets greater than \$250,000.

**Activity:** Our first donor-advised fund was created in 1974. There have been 81 new funds created in the past five years. This reflects a growing interest from donors in being involved with their philanthropy during their lifetimes.

**Focus:** Major grantmaking categories include basic human needs, education, mentoring and after-school programs, arts, healthcare, housing and economic development, and family and social services.

**Knowledge and Impact:** Donors who partner with the Foundation have the opportunity to learn about critical needs in the community through various in-person and virtual activities. Our experienced staff works closely with donors and their families to champion their charitable vision.

### Learn More. Here's How.

We would love to share more about donor-advised funds with you. Please visit our website at [www.hfpg.org](http://www.hfpg.org) or contact Sally Weisman, Director of Development and Donor Grants, at 860-548-1888 or [sweisman@hfpg.org](mailto:sweisman@hfpg.org).

**In 2021, 1,370** grants were made from donor-advised funds

**\$11.1** million in total grants were awarded

**23.6%** of total annual Foundation grants came from donor-advised funds.

### Fund Highlights

Fund Minimum: **\$10,000**  
(may build up)

Minimum Grant: **\$250**

Family and Next  
Generation Involvement

Site Visits

No Geographic Limits

Online Donor Portal

Grants Express