

FLEXIBLE GIVING OPTIONS: Choose What's Right For You



HARRISONBURG-ROCKINGHAM

TCFHR offers a variety of fund types. Your choice will depend on your desired level of involvement, your charitable goals, and how you intend to start the fund and continue giving.

DESIGNATED FUNDS

Established by donors to benefit specific nonprofit organizations.

A great option to support your favorite nonprofit.

DONOR-ADVISED FUNDS

Funds designed so that donors (individuals, families and businesses) can participate in the grant-making process.

Providing the maximum flexibility to give to causes and organizations of your choice, and we do the administrative work.

AREA OF INTEREST FUNDS

Established by donors to benefit organizations working in specific fields (i.e., history, animals, health services).

A good option for those passionate about a certain cause or interest and wanting to support any organization working within that field. Donors do not have to name a specific nonprofit, allowing flexibility for the future.

SCHOLARSHIP FUNDS

Investments in the education of tomorrow's leaders in academic and vocational readiness.

A popular choice to honor a loved one or to pay it forward, these funds can be set up to make awards to students meeting specific criteria.

COMMUNITY ENDOWMENT FUND

Providing support for critical needs in the community.

Your donations to this board-directed fund help us be responsive to community needs.

AGENCY-ADVISED FUNDS

Established by nonprofit or religious organizations to utilize TCFHR's investment oversight and endowment administration expertise.

PASS THROUGH

Gifts processed and sent directly to nonprofits immediately or over a period of time.

Ideal for individuals who want to give securities to a nonprofit that may not otherwise be able to accept it. This option also works for donors who want to give to multiple organizations through their estate and maintain the flexibility of updating their plans.

We welcome the opportunity to meet with you and discuss your needs.

STEP BY STEP: Customizing Your Fund



HARRISONBURG-ROCKINGHAM

1. SHARE YOUR DREAMS

To get started, speak with TCFHR staff and/or your financial advisor about your charitable goals. We listen to your priorities and needs, and then develop options for you to explore.

2. CHOOSE FROM OUR FUND TYPES

Review our fund types and speak with a TCFHR staff member to learn which fund type might best meet your goals.

3. DECIDE WHAT TO GIVE

It's easy to convert your assets into impact! Any type of asset can be used to start a fund, including cash, publicly held securities, closely held stock, real estate, and private foundation assets. Talk to us about other, more complicated assets.

4. NAME YOUR FUND

Funds can be named after the family, business, individual or organization, or even the theme of giving (one of our funds is called "You Can't Take It With You Fund"). If you prefer anonymity, name your fund to reflect that choice.

5. CHOOSE HOW YOUR GIFT IS INVESTED.

Our investment committee of seasoned professionals manages our portfolio, but you may also recommend that your current advisor continue to manage the fund.

6. STAY UP-TO-DATE ON EARNINGS.

Our easy-to-use portal allows you to view quarterly statements, and if your fund is set up as donor-advised, you can easily make grant recommendations.



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