

Types of Assets to Gift

Help clients find the right type of fund to meet their philanthropic goals.

As a financial advisor, you're essential in guiding clients along their philanthropic journey. That means aligning their unique goals and interests with the right kind of charitable fund.

At NCF, we offer a variety of fund options that not only cater to clients' specific needs, but also offer tax-free growth for maximum philanthropic impact.

Funds available through NCF

Donor-advised fund (DAF):

When clients contribute cash or complex assets to a DAF, their contributions become tax-deductible. These funds can be invested for tax-free growth, allowing clients to maximize charitable impact for grant recipients of their choice.



Endowments:

With an endowment fund, clients can support a charitable cause in perpetuity. Once they invest a principal amount into the fund, the subsequent investment returns can be used to provide ongoing financial support for their designated charity. Your clients' gifts and all future earnings become a perpetual source of charitable community capital, thereby preserving their legacy for generations to come.



Scholarships:

A scholarship fund with NCF allows clients to ease the financial burden of education for students in Pre-K all the way to postgraduate study. Clients can specify criteria for receiving scholarship funds and participate in the selection of scholarship recipients. NCF also provides comprehensive support to help clients identify specifications and guidelines related to the scholarship, the scholarship application process, promotion of the scholarship opportunity, verification of students' eligibility, and the processing of scholarship payments. To initiate a scholarship fund, NCF requires a minimum donation of \$25,000. And clients aged 70 and up can make charitable contributions from their IRAs to specified scholarship funds.



Designated fund:

A designated fund with NCF allows clients to specify which charitable organizations they want to financially support, either in perpetuity or for a finite period of time, making it one of the most flexible options for charitable giving. Establishing a designated fund gives clients the freedom to make donations over time based on their specified timeline, and they can set up additional designated funds if they wish to support multiple charities. Clients aged 70 and older can also make qualified charitable distributions from their IRAs to designated funds.



Field of interest fund:

A field of interest fund with NCF gives clients the ability to support a general area of charitable interest without adhering to a specific non-profit organization. It's a way for clients to participate in a broader range of philanthropy while NCF helps to determine the most appropriate organizations to channel funds. This ensures clients' flexibility in choosing charitable causes that drive meaningful change over time.

Help clients build a lasting legacy with an NCF

Strengthen your clients' philanthropic impact with the expert guidance of NCF. Connect with us today to get started.