

## Donor Advised Funds in support of Metal Health America of Dutchess County

A donor-advised fund (DAF) is an increasingly popular way to make a charitable gift. Creating a DAF can provide you with immediate tax benefits while making your charitable giving easier for years to come. Here are two simple ways you can make a gift through your DAF:

- Make an outright gift now by recommending a grant to Mental Health America of Dutchess County.
- Create a succession plan to recommend that Mental Health America of Dutchess County receive all or a portion of the fund value upon the termination of the fund.

You can select the option that best suits your philanthropic and financial goals to support Mental Health America of Dutchess County. Just contact your donor-advised fund administrator to recommend a grant to Mental Health America of Dutchess County or to discuss a succession plan.

If you include Mental Health America of Dutchess County in your plans, please let us know, and be sure to use our legal name and federal tax ID:

**Legal Name:** Mental Health America of Dutchess County

**Address:** 253 Mansion Street  
Poughkeepsie, New York 12601

**Federal Tax ID Number:** 14-1402059

### Why It's Right for You

Creating a donor-advised fund can provide you with immediate tax benefits while making your charitable giving easier for years to come.

### How It Works:

1. Establish a DAF at a sponsoring charity, such as a Community Foundation, or a financial services company. Check with the sponsor about the minimum contribution required to start a DAF, which typically ranges from \$5,000 to \$25,000. You can contribute cash or appreciated assets such as stocks or mutual funds. You'll get an immediate income tax charitable deduction for your contribution that could reduce your taxes if you itemize.
2. Once established and funded, you can recommend that your favorite public charities, such as Mental Health America of Dutchess County, receive grants from your DAF. Most DAFs have a minimum grant recommendation, or you can recommend distributing the entire balance of your DAF to a cause important to you. You do not get an additional income tax charitable deduction for these grants.
3. You can also create a succession plan with your fund sponsor to recommend that some or all of the remaining assets in your fund at your passing go to Mental Health America of Dutchess County and other charities that are important to you.

**Mental Health America of Dutchess County** is grateful for grants that come from donor-advised funds. If you are considering establishing a DAF, we can suggest several sponsors for your review. You should also consult your professional adviser for guidance. **If you have any questions for MHA please contact Charles Flynn JD, Planned Giving Representative, 845-473-2500 x 3083, [cflynn@mhadutchess.org](mailto:cflynn@mhadutchess.org)**