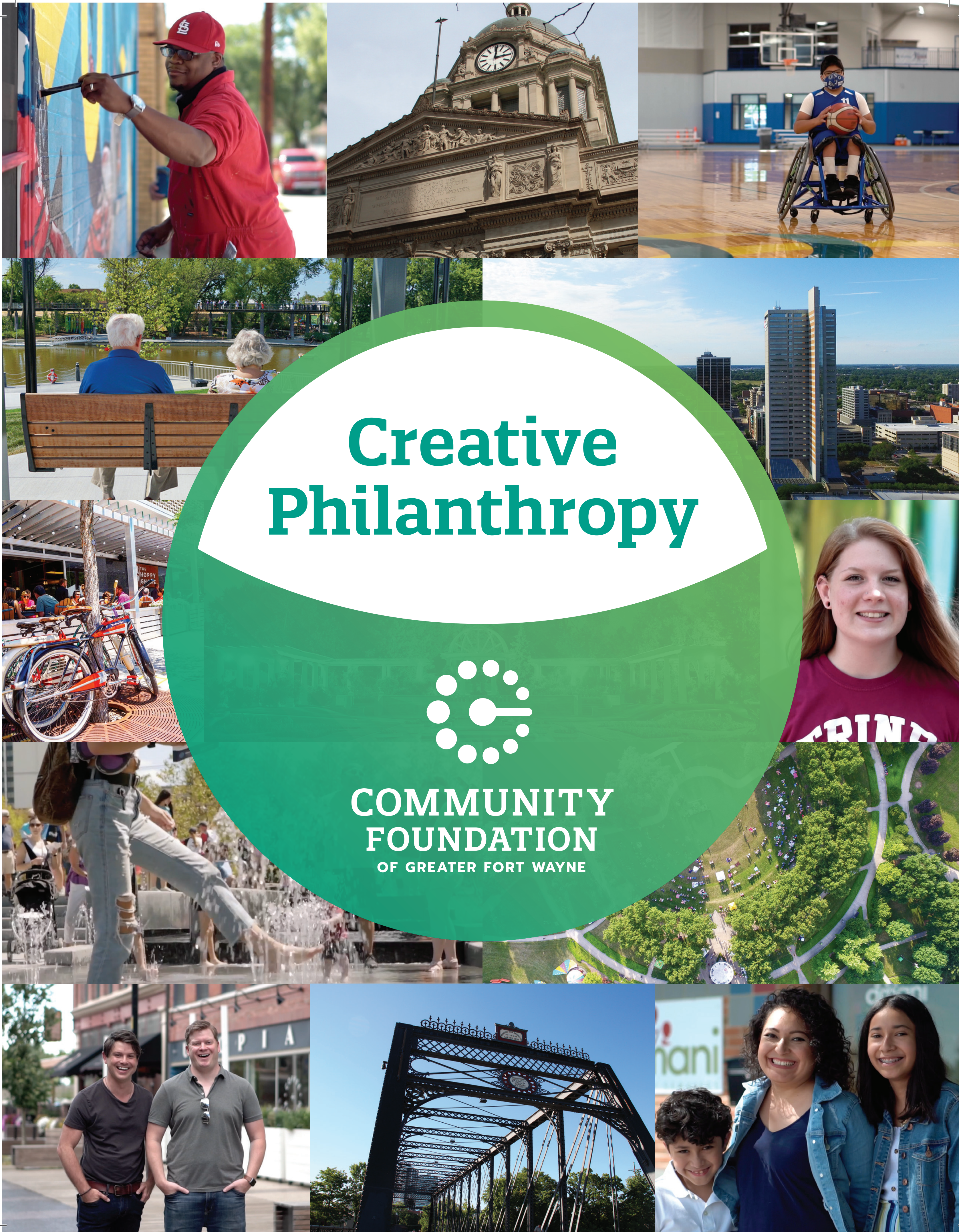


Creative Philanthropy

COMMUNITY FOUNDATION
OF GREATER FORT WAYNE

Why the Community Foundation?

With an office located in downtown Fort Wayne, Indiana, and over a century of leadership, the Community Foundation of Greater Fort Wayne is led by individuals who care deeply about the impact of philanthropy in our community and are grounded in a deep understanding of local needs.

Founded in 1922, CFGFW is the fourth largest Community Foundation in Indiana. Today, we serve thousands of givers and advisors with like-minded relationships—creating giving solutions, helping families pass down values, strengthening the nonprofit sector, and helping corporations achieve impact.

The result? More for those who truly need it.
More community impact. More compassion.
And, ultimately, more purpose and joy for you.

COMMUNITY FOUNDATION
OF GREATER FORT WAYNE

$289M
IN TOTAL ASSETS

270
LEGACY SOCIETY MEMBERS

$218M
IN GRANTS TO CHARITIES SINCE 1922

22
STAFF MEMBERS READY TO HELP YOU

625
FUNDS

17
DEDICATED BOARD MEMBERS

10,297
GENEROUS DONORS

3,000
SCHOLARSHIPS SINCE 1922

Numbers as of December 2025

Donor Advised Funds

Donor Advised Funds (DAFs) are the most popular fund type offered at the Community Foundation of Greater Fort Wayne.

A Donor Advised Fund (DAF) at the Community Foundation of Greater Fort Wayne is a flexible charitable giving account that allows you to contribute a variety of assets—such as cash, stock, and other non-cash assets—while receiving an immediate income tax deduction. Over time, you can recommend grants to the causes and organizations you care about most.

DAFs can be established by individuals, families, corporations, or entities focused on a particular cause. They may be used for short-term giving or structured as long-term, endowed funds that create lasting impact for generations to come.

WHY?

Simple Reduce paperwork, receipts, and administration

Anonymity You can maintain as much or as little anonymity as you would like

Impact You can make gifts as little as $100 or as large as your fund size

Convenient Manage all of your giving online

Far Reaching Give anywere

Short-Term or Long-Lasting Can be spent down over your lifetime or passed down to your children

PROCESS

Give cash, stock, real estate, and life insurance

Support organizations and causes of your choice

Creativity in Action

Philanthropy is growing increasingly sophisticated. Many are going beyond one-off donations to individual organizations and are looking at the broader issues that interest them or their company that they can have an impact on. Donor Advised Funds are the perfect tool to meet and adapt to your changing interests, and CFGFW is a natural partner to help take your philanthropy to the next level.

Donor Advised Funds can also be adapted to meet the needs of specific causes in the community. For those who rally around a specific initiative, Donor Advised Funds can be adapted as fundraising vehicles to help support specific community needs.

Donor and Corporate Services

- Philanthropic Planning
- Family Philanthropy
- Nonprofit Research
- Succession Planning
- Personalized Grantmaking
- Community Connection
- Educational Events and Resources

AT A GLANCE

- $10,000 to start a fund
- Designed to be spent down to $0 or to last in perpetuity
- Enables you to support a specific organization or area of interest

Fees are:

- **Nonpermanent:** 2% of grants distributed with a $500 minimum
- **Endowed:** Tiered fee starting at 0.80% with a $500 minimum

Scholarship Funds

Scholarships are a way for businesses, organizations, individuals, and nonprofits to commit to helping students achieve their dreams of education.

Whether it be a four-year university, K-12 private school education, scholarships to encourage employees to finish their degrees, or nontraditional students needing to complete a certification—scholarships can be formatted in many different ways. Donors can establish a scholarship fund that will be invested for long-term growth, using a portion of the earnings to provide the scholarships.

Scholarships are awarded based on criteria that are important to the donor, such as a specific major, grade point average, or financial need. Donors also determine if the scholarship will be a one-time gift, or if they would like the same student to get the same recurring gift throughout their education.

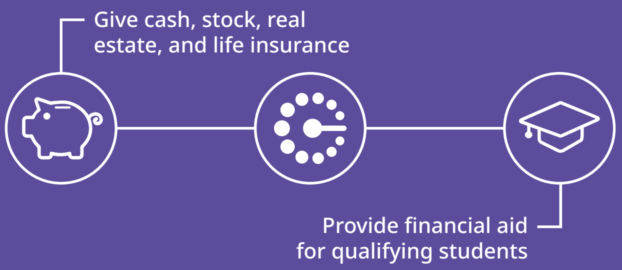
WHY?

Honor Establish a fund in the name of a family member or company founder

Relationship Keep informed of the students who benefit from your generosity

Flexible Choose the criteria, recurrence, type of student, and school

PROCESS



AT A GLANCE

Scholarships

- $50,000 to start the fund
- Both non-recurring and renewable scholarships are available
- Selection process can happen through CFGFW or an outside organization
- Accepts a wide range of assets
- Fees on a tiered fee schedule starting at 2%

Designated Funds

Designated Funds allow donors to establish a named fund and designate specific organizations they would like to support through this fund—forever.

Just as you give annual contributions in life, Designated Funds allow for those yearly gifts to continue on to support your legacy. Donors can establish a Designated Fund that will be invested for long-term growth, using a portion of the earnings to provide grants. Donors can specify certain programs within an organization to support or have their fund give unrestricted gifts. Percentages can also be determined if more than one organization is supported through a Designated Fund.

WHY?

Personal Honor a loved one or your legacy by supporting the organizations they were passionate about

Flexible Add to the fund at any time and support multiple organizations with one fund

Memorialize Name the fund in memory of someone or name it to recognize your family

Enduring Make a continual impact, allowing specific nonprofits to continue their mission into the future

PROCESS

AT A GLANCE

- $10,000 to start a fund
- Recurring annual grants
- One fund can support many different organizations
- Can support specific programs or give unrestricted
- Accepts a wide range of assets including cash, stock, real estate, and life insurance
- Fees are 1.25% with a $500 minimum
- 20% match on any new gifts to the fund

Field of Interest Funds

Field of Interest Funds allow donors to support the topics they are most passionate about, long into the future.

Field of Interest Funds allow donors to leave a legacy by supporting many different organizations or projects within the community, around a specific purpose, such as supporting the arts or education, or with a specific population, such as children or the elderly. Field of Interest Funds are invested for long-term growth, using a portion of the earnings to provide grants. The Community Foundation then uses its specific knowledge of current needs and projects to make grants from the fund for greatest impact.

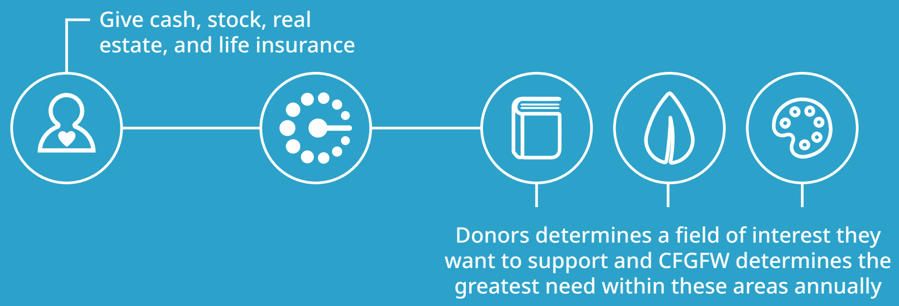
WHY?

Legacy Create a highly personal and permanent legacy supporting your areas of passion

Memorialize Name the fund in memory of someone or name it to recognize your family

Flexible Funds a variety of recipients annually

PROCESS



AT A GLANCE

- $10,000 to start a fund
- Designed to last in perpetuity
- Enables you to support a specific area or population of interest
- Community Foundation makes decisions on where funding goes
- Fees are 1.25% with a $500 minimum

Bright Future Funds

Bright Future Funds are a way to support the greatest need in the community at any given time, making an impact forever.

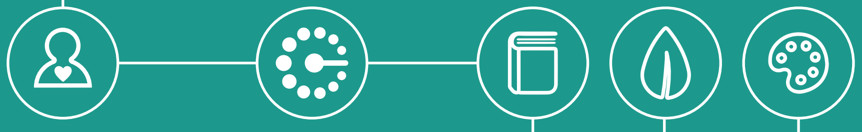
A Bright Future Fund focuses on specific, high-priority needs within the Greater Fort Wayne community. This is a way for donors to not only create a lasting legacy, but to lead a positive change within the community long into the future. The Community Foundation's board of directors and staff determine which areas of need are greatest at that point in time and which organizations can help maximize the impact of grants made from this fund.

WHY?

- **Simple** One of the easiest ways to give and make an impact in your community
- **Personalized** Opportunity to name the fund after yourself or honor a loved one
- **Long-Lasting** The easiest way to support the local community—in perpetuity

PROCESS

Give cash, stock, real estate, and life insurance



Grants are given to organizations that serve the community's greatest needs

AT A GLANCE

- $10,000 to start a fund
- Designed to last in perpetuity
- Allows giving to focus on high-priority needs
- The Community Foundation makes decisions on where funding goes
- Fees are 1.25% with a $500 minimum

Legacy Funds

Legacy Funds provide a way for a donor to leave a lasting legacy and be remembered for it.

Legacy Funds are charitable funds established through a bequest in a will with an estate planning attorney to a named fund created at the Community Foundation. There is no cost to set up a Legacy Fund, and if a donor decides to change the purpose of the fund down the road, this can be done with a simple amendment to the agreement. This will ensure that your philanthropic goals are honored to support your intentions and legacy.

WHY?

Assurance Ensure that your legacy supports exactly what you intend

Flexible Determine what kind of fund you want to create to support your passion

Personal Name family members or loved ones to act as advisors to a fund

PROCESS

Donor establishes a fund through a will

Grants are given to the organization or cause designated by the type of fund established

AT A GLANCE

- No cost to set up
- Designed for peace of mind to ensure your intentions are honored
- Allows for donors to name successors to the fund

Funds Overview

Grants	Donor Advised Fund	Donor Advised Fund (endowed)	Scholarship	Designated Fund	Field of Interest Fund	Bright Future Fund	Legacy Fund
Granting to a nonprofit or government entity	✓	✓	✗	✓	✓	✓	✓
Grants to support the individual	✗	✗	✓	✗	✗	✗	✓
Each grant directed by the individual	✓	✓	✗	✗	✗	✗	✓
Grants by CFGFW with initial donor guidance	✗	✗	✓	✓	✓	✗	✓
Makes grants after death	✗	✗	✓	✓	✓	✓	✓
Can be anonymous granting	✓	✓	✓	✓	✓	✓	✓
Can make recurring grants	✓	✓	✓	✓	✗	✗	✓
Granting outside of direct community	✓	✓	✓	✓	✓	✗	✓

Funding Options	Donor Advised Fund	Donor Advised Fund (endowed)	Scholarship	Designated Fund	Field of Interest Fund	Bright Future Fund	Legacy Fund
Cash	✓	✓	✓	✓	✓	✓	✓
Appreciated Stock	✓	✓	✓	✓	✓	✓	✓
Real Estate	✓	✓	✓	✓	✓	✓	✓
Tangible Personal Property	✓	✓	✓	✓	✓	✓	✓
IRA, 401(k), or Other Retirement Assets	✓	✓	✓	✓	✓	✓	✓
IRA,RMD/QCD	✗	✗	✓	✓	✓	✓	✓
Whole Life Insurance	✓	✓	✓	✓	✓	✓	✗
Life Insurance Beneficiary	✗	✗	✗	✗	✗	✗	✓
Private Foundation Rollover	✓	✓	✓	✓	✓	✓	✓
Remainder Tnterest from a CRT	✓	✓	✓	✓	✓	✓	✓

Cost	Donor Advised Fund	Donor Advised Fund (endowed)	Scholarship	Designated Fund	Field of Interest Fund	Bright Future Fund	Legacy Fund
Minimum Cost	$10K	$10K	$50K	$10K	$10K	$10K	$0
Administrative Fees (All with a $500 minimum)	2% of grants distributed	Starting at 0.8%	Starting at 2%	Starting at 1.25%	Starting at 1.25%	Starting at 1.25%	None

COMMUNITY
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