



Decisions When Opening A Fund

1. Will this be funded with current assets or through your estate?

Assets

- | | |
|---|--|
| <input type="checkbox"/> Cash | <input type="checkbox"/> Appreciated Real Estate |
| <input type="checkbox"/> Appreciated Securities | <input type="checkbox"/> Other _____ |

2. What type of fund do you want?

- Endowment** (only income is granted out, principal remains intact providing grants in perpetuity)
- Non-Endowment** (the total assets of the fund may be granted out)

3. What is the charitable purpose of your fund?

You can support specific organizations, certain charitable causes or “general charitable purposes” or a combination or purposes.

4. How will grants be made from the fund?

- A. Board of Governors decide based on greatest need within field(s) you identify
- B. Recommended by donor(s), you may appoint a successor advisor if desired.
- C. Recommended by family or other group identified by donor(s)
- D. Go directly to a specified organization(s) named by the donor(s)

5. Choose a name for your Fund.

The San Diego Foundation - For good. For ever.

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