



**Knights of  
Columbus**  
Charitable Fund®

# **The Charitable Fund:** *A Premier Donor-Advised Fund for Catholics*



***Inspiring Catholics, Empowering Catholic Organizations***



From the very beginning of the Catholic Church, generosity has been a main pillar of our faith. St. Paul the Apostle said it best: “Each must do as already determined, without sadness or compulsion, for God loves a cheerful giver” (2 Corinthians 9:7). Creating us in his image and likeness, God made us to be generous beings. It is our mission at Knights of Columbus Charitable Fund (KCCF) to help you listen closer to what God has imprinted on your heart and, through your generosity, to help build the Kingdom of Heaven right here on Earth.

Executing your philanthropic plan through KCCF means total certainty that you are driving your philanthropy to charities and causes aligned to your Catholic faith.

We encourage you to involve the entire family in your giving through KCCF as well, which can initiate a culture of generosity among your children and ensure a legacy of Catholic philanthropy that lasts generations. The fund is user-friendly, offers a platform for consistent giving and may provide a tax benefit depending on your personal circumstances.

Our Charitable Fund is a simple, low-cost way to maximize your charitable giving to the causes you care most about. Within a matter of minutes, you can establish your account and begin your journey of generosity with KCCF. The Charitable Fund, KCCF’s donor-advised fund, is a burgeoning charitable tool in the United States, and KCCF is the largest national donor-advised fund sponsor created for Catholics and administered by Catholics.

With KCCF, not only do you join our community of generous donors, you also align your charitable goals with the world’s premier lay Catholic men’s organization. With nearly 150 years of charitable giving and billions of dollars donated to worthy causes throughout the world, the Knights of Columbus is a leader in Catholic philanthropy. By opening an account with KCCF, you allow yourself access to that expertise.

## WHAT IS A DONOR-ADVISED FUND?

A donor-advised fund (DAF), is a philanthropic vehicle administered by a public charity (“sponsoring organization”), which allows donors to make an irrevocable charitable contribution, potentially receive an immediate tax deduction and recommend grants from the fund over time.



An easy way to imagine a DAF is as a charitable wallet: donors contribute to the fund as frequently as they like and then recommend grants to their favorite charities when they are ready.

Assets in a DAF are invested in strategies chosen by the donor with no tax consequences for potential growth.



## Fee Schedule

INDIVIDUAL FEE SCHEDULE	ADMINISTRATIVE FEE
First \$500,000	0.50% or \$120 (whichever is greater)
Next \$500,000	0.45%
Next \$1,000,000	0.40%
Next \$3,000,000	0.35%

Individuals looking to open accounts greater than \$5,000,000 should contact 1-833-877-0728 directly for fee schedule.

## Account Features

- ▶ No minimum initial contribution and no minimum account balance
- ▶ \$25 minimum grant recommendation
- ▶ Annual minimum administrative fee is 0.50% or \$120, whichever is greater
- ▶ Secure online Donor Dashboard
- ▶ Catholic-compliant investment options provided by Knights of Columbus Asset Advisors
- ▶ In-depth, proprietary due diligence screening of all grant recommendations, ensuring alignment with Catholic teaching



**MAKE  
TAX-DEDUCTIBLE  
CONTRIBUTIONS**



**CONTRIBUTE ALL  
TYPES OF ASSETS**



**CHOOSE INVESTMENT  
OPTIONS**



**RECOMMEND  
GRANTS**

Please call toll-free **833.877.0728** or visit **knightscharitable.org** for additional information.



## Why Consider Us?

**Credibility** — We are affiliated with the Knights of Columbus, the world’s largest Catholic fraternal organization with nearly 150 years of committed support for the Catholic Church as well as suffering, needy and persecuted communities around the world.

**Alignment** — Our investments are consistent with Catholic moral teachings, and grant recipients are reviewed so that no grants are awarded to organizations with a mission or identity that in any way runs counter to the Catholic faith.

**Value** — We offer “value with values,” offering high-quality, low-cost services designed to meet your needs.

**Stewardship** — Donating through Knights of Columbus Charitable Fund (KCCF) puts your resources to good use, since all donations support sound charities.

**Accessibility** — Regardless of size, your organization gains access to philanthropic solutions usually reserved for large, well-staffed institutions. We serve charitable organizations from Knights of Columbus councils to Catholic apostolates in their mission of generous giving.

## Partnering with Knights of Columbus Charitable Fund

We would welcome the opportunity to hear about your philanthropic goals and to discuss how Knights of Columbus Charitable Fund can play a role in helping you pursue those goals.

To learn more about KCCF, please contact our donor support line toll-free at 1-833-877-0728 or email us at [charitablefund@kofc.org](mailto:charitablefund@kofc.org).

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Knights of Columbus Charitable Fund is an independent, nonprofit, public charity with a donor-advised fund program. Various entities affiliated with Knights of Columbus provide certain investment management and administrative services to Knights of Columbus Charitable Fund. Knights of Columbus Asset Advisors serves as the investment manager of Knights of Columbus Charitable Fund, and the assets are invested in investment funds managed by Knights of Columbus Asset Advisors for which Knights of Columbus Asset Advisors receives a fee. This results in an additional fee, the amount of which depends on the management fee charged to, and the assets allocated to, each such investment fund. Investing involves risk. The value of an invested donation will fluctuate over time and may gain or lose money.

You should consider the investment objectives, risks and charges and expenses of the donor-advised funds carefully before investing. Nothing presented herein is intended to constitute investment advice and no investment decision should be made based on any information provided herein. Nothing presented herein should be construed as a recommendation to purchase or sell a particular type of security or follow any investment technique or strategy. No guarantee of investment performance is being provided and no inference to the contrary should be made.

Knights of Columbus Assets Advisor is an investment adviser registered with the Securities and Exchange Commission, and a wholly-owned subsidiary of Knight of Columbus. KoCAA's Form ADV Part 2 is available upon request.

Information provided is educational in nature and is not intended as legal, tax, financial, or other professional advice. Knights of Columbus Charitable Fund does not provide legal, tax, financial, and other professional advice. You should consult professional advisors concerning the legal, tax, or financial consequences of your charitable activities. KCCF does not provide tax advice to donors or sponsoring organizations of private label programs. While individuals who itemize may receive charitable deductions of up to 60% of adjusted gross income (AGI) for cash contributions and 30% of AGI for contributions of appreciated assets, each donor's tax position is unique; therefore, donors must seek their own tax advice.

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