DonorsTrust is turning twenty. We are proud of what hundreds of liberty-focused organizations have accomplished during those decades. More importantly, we are pleased that our account holders have recommended more than $1.1 billion to support their efforts (and that of so many others).

DonorsTrust seeks a strong and vibrant civil society fostered by private philanthropy and private institutions. Undergirding such a society are the bedrock principles of limited government, personal responsibility and free enterprise. Much of our giving has gone to the think tanks, student organizations, public interest law firms, and educational groups that advocate for these cherished principles of freedom. Yet our donors also give generously to the religious groups, medical research institutes, educational programs, social welfare, and arts institutions that enrich our corporate civic life.

These days we receive more nods when we ask if people understand the simplicity, tax savings, and security that donor-advised funds (DAFs) provide. We are not surprised, since donor-advised funds continue to proliferate across the nation. Nationally, new DAF accounts are growing four times faster than are new private foundations. In 2018, the number of people using DonorsTrust grew nearly twenty percent, and is up 62 percent over the past five years.

While our DAF accounts remain our primary program, we also seek to be a like-minded partner with donors who want to grow the resources available to advance liberty over the long term. Here are some of the ways we did this in 2018:

- We focused on helping donors support their principles through planned and estate giving. Partnering with a number of state-based and national groups, we developed a program that explores the various planned giving tools that allow for more strategic philanthropy both in life and as a legacy.

- The Novus Society, our donor-advised fund program for givers under age 40, continues to grow. As the philanthropic world concentrates on engaging younger donors, we are proud to have taken early steps toward building up a new generation of philanthropic leaders.

- The DonorsTrust team attended, spoke at, and sponsored more than 45 dinners and events hosted by non-profits across the liberty movement. We had countless meetings with non-profit leaders. All of these gain us a deeper understanding of the ebb and flow of these groups’ activities and projects, enabling us to enhance the knowledge our account holders already bring to the table.

2019 is already proving to be another strong year, though it will not be one without challenges. There is work to be done to ensure that the concepts of free enterprise and limited government remain the norm, not the exception. All of us at DonorsTrust are proud to work each day with generous philanthropists who freely give to preserve these unique and important ideas for future generations.

Lawson R. Bader, President & CEO
Building A Legacy of Liberty

At DonorsTrust our primary focus is on our donors and protecting their donor intent.

Over time, we have too often witnessed philanthropic capital stray from an original donor’s free-market ideals—the very principles that made their philanthropy possible in the first place. As an antidote to this drift, DonorsTrust was established in 1999 as a 501(c)(3) public charity to preserve the intent of donors dedicated to the ideals of limited government, personal responsibility and free enterprise.

We are a community foundation bound not by geography but by a set of principles, offering donor-advised funds that allow donors across the country to advance their philanthropic goals.

DonorsTrust offers the benefits you expect from any donor-advised fund, such as generous tax advantages and simplified and private giving. We set ourselves apart with our focus on preserving donor intent and with our shared commitment to supporting organizations that do not rely on government funds to meet their charitable objectives.

The DonorsTrust Story

The idea for DonorsTrust began with a single donor concerned about whether the community foundation to whom he'd entrusted his money would stay faithful to his charitable wishes after his death. DonorsTrust founders Whitney Ball and Kim Dennis suggested that what he needed was a community foundation for liberty-minded donors.

That idea grew into a vision, and that vision became DonorsTrust.

Since inception, DonorsTrust has granted out over $1.1 billion to over 1,900 charities that protect our constitutional liberties and strengthen civil society without expanding government. We believe that the key to solving societies problems comes from the private philanthropy.
How Does a **Donor-Advised Fund** Work?

A donor-advised account is the easiest, most efficient way to manage your charitable giving.

Think of it as your own charitable savings account. Many use a donor-advised fund as an alternative to a private foundation, thus eliminating the need for required distributions, mandatory IRS filings, and annual excise taxes.

To begin, you establish your DonorsTrust account with a minimum contribution. You can fund the account with cash or in other tax advantaged ways: using appreciated stock, closely held stock, or personal property such as real estate. All contributions to the account are immediately tax deductible and as such are legally controlled by DonorsTrust.

Through the account, you, your family, or your designated advisor(s) can request grants to public charities. You may make grant recommendations to a variety of local, national, or international non-profit organizations at any time and throughout the life of your account. Making grant requests is simple – use our online portal, email or fax in a simple form, or call us directly.

Maximize your charitable efforts by investing your account’s assets in various investment pools maintained by DonorsTrust. This can become an important strategy to enhance your giving power over time.

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**Account Basics**

- **Minimum Initial Contribution:** $10,000
- **Minimum Subsequent Contribution:** $500
- **Minimum Grant Recommendation:** $100

Administrative fees equal 1% of the account balance annually.
No minimum account balance after initial gift.
No minimum annual grant-making requirements.
The Benefits of Partnering with **DonorsTrust**

**Simplified Giving:**
Opening an account is simple. Once open, our team handles the administrative side of giving so you can focus on what counts.

“During the early days, I feared that donating through a third party—DonorsTrust—would be cumbersome. It all seemed complicated...filling out forms to donate, etc. I was so wrong. Donating through DonorsTrust is super easy—and saves me so much time.”

— Frayda Levy, New Jersey

**Planned Giving:**
Use your fund to safeguard the charitable aspects of your estate plan or as the charitable beneficiary of complex or split-interest gifts.

“DonorsTrust has a presence with most of the places we visit within the network. It’s a wholesome place to be involved.”

— George Pearson, Kansas

**Personalized Service:**
When you call our office, you’ll talk to a person. We believe simplifying giving means personalizing it as well.

“DonorsTrust has a presence with most of the places we visit within the network. It’s a wholesome place to be involved.”

— George Pearson, Kansas

**Tax Advantage:**
Stretch your giving farther with gifts of appreciated stock or real estate. Receive more generous tax treatment than a private foundation.

“I initially established an account mainly for tax savings. I had proceeds from a house sale and knew I’d be making charitable gifts in the future. Working with the knowledgeable staff at DonorsTrust to set up an account couldn’t have been easier.”

— Ann Fitzgerald, Virginia

**Fostering New Givers:**
Givers under age 40 can grow their charitable muscles, increase their impact, and connect to peers and mentors through our Novus Society.

“DonorsTrust has a presence with most of the places we visit within the network. It’s a wholesome place to be involved.”

— George Pearson, Kansas

**Donor Intent Protection:**
We share your passion for using philanthropy to support the cause of liberty, and we are committed to protecting your donor intent.

“So why DonorsTrust vs. Fidelity or Schwab? For me, it would be that it’s a more focused fund and there are consultative aspects that you aren’t going to get anywhere else.”

— John, Indiana

**Commitment to Liberty:**
We know the liberty movement, and we, like our clients, want to see those organizations advancing liberty grow.

“DonorsTrust has a presence with most of the places we visit within the network. It’s a wholesome place to be involved.”

— George Pearson, Kansas

**Flexible Giving:**
Receive more flexibility on timing and privacy than with a private foundation or checkbook giving.
2018 By the Numbers

Average account size: $570,280
Median account size: $18,717
Average grant: $73,890
Median grant: $5,000

Contributions to Accounts: $195,970,000
Grants to Charities: $146,660,000
Public policy giving – 2018: 67%

Largest grant was $10m to the Foundation for Jewish Camping
Smallest grant was $100, a sum contributed to hundreds of organizations
2,032 grants recommended to 682 unique charitable organizations

Contributions
to donor-advised accounts in millions

Grants
from donor-advised accounts in millions

Annual Volume of Grants

Payout Ratio
grants disbursed:contributions received
Nearly 70% of grants recommended by our clients go to liberty-oriented policy groups—including state and national think tanks, student programs, university centers, and public interest law organizations. Our clients also give generously to medical, arts, religious, and civic charities that don’t rely on significant amounts of government funding (generally not more than 25%). Below is just a sampling of the hundreds of organizations for which our clients recommend support through their funds.
Serving a Community of Givers and Doers

DonorsTrust is a community of donors devoted to creating a better future. Our donors support charities they believe protect our nation’s constitutional liberties and strengthen civil society through private institutions rather than with government programs.

Our marque donor-advised fund program simplifies, protects, and promotes charitable giving for donors of all types, but DonorsTrust offers more than donor-advised funds. Here are some of our other programs.

**Novus Society**
The donor society for emerging philanthropists under 40 that helps younger givers connect with like-minded peers, learn from established philanthropists, and grow their charitable impact.

**Whitney Ball Memorial Fund**
Named in honor of DonorsTrust’s founding president, this fund offers donors a way to support DonorsTrust and its work directly, which in turn grows the broader constellation of liberty-minded organizations.

**Fiscal Sponsorships**
A way to help social entrepreneurs incubate new liberty-advancing charitable efforts on the way to being full-fledge non-profit organizations.

**Strategic Venture Funds**
A targeted account for donors to pool resources toward charitable action tackling a particular social problem.

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DonorsTrust

DT Philanthropic Services

BOARD OF DIRECTORS

Lawson R. Bader
Thomas E. Beach

George G. Coates
James E. Piereson

Kimberly O. Dennis, Chair

All contributions, once accepted to donor-advised fund accounts and strategic venture funds, are irrevocable charitable gifts to DonorsTrust or Donors Capital Fund (DCF), both (c)(3) public charities. DonorsTrust or DCF has exclusive legal control over the assets contributed, and does not provide goods, services, or personal benefits in exchange for contributions. Grants from accounts are made upon request to board-approved charities. Grants from accounts are not approved if a grantee provides any person goods, services, or release from an existing legal obligation (including a legally binding charitable pledge) in return. Grantees must be publicly supported charitable organizations or private operating foundations, and may not use grant proceeds for lobbying or political campaign activities.