



Empowering Your Charitable Vision

The demand for customized philanthropic solutions has never been greater. Charitably motivated individuals are exploring more efficient ways to impact their communities, while also leaning heavily on professional advisors to guide their understanding of the tools available to maximize their impact in creative and effective ways. Studies show that tomorrow's leaders and decision-makers will increasingly see value in a variety of gift structures with special focus on accessibility and tech-enabled philanthropy.

Standing at the intersection of donors, professional advisors, and the non-profit agencies best positioned to make an impact, DJCF/SWCF is committed to providing thought leadership, innovative solutions and increasing collaboration across the non-profit sector.

About DJCF and SWCF

Since our founding in 1973, DJCF has been proud to serve as a resource for individuals and families, non-profit organizations, and professional advisors interested in creative and customized solutions designed to maximize charitable giving. This legacy is enhanced by the work of our affiliate, SWCF, whose primary role is to serve as a philanthropic back office for financial institutions, family offices, and investment advisory firms. Combined, DJCF and SWCF leverage our breadth of expertise while facilitating collaboration across the philanthropic sector in North Texas and beyond.

Flexible and Customized Services

Individuals & Families:

- Donor-advised funds, endowment funds, and scholarship funds
- Endowment and planned giving advice
- Family philanthropic advisory services

Professional Advisors:

- Professional advisor education series, including our nationally recognized annual seminar, professional networking groups and workshops
- Charitable planning tools & calculator

Non-Profit Agencies:

- Endowment and planned giving gift acceptance support
- Custodial investment funds, both operating and endowment
- Short term financing solutions

Let's Talk

Contact us to discuss your philanthropic objectives with our team.

DJCF (214) 615-9351 | info@djcf.org | djcf.org

SWCF (214) 615-5209 | info@southwestcf.org | southwestcf.org

Donor-Advised Fund Resources

A donor-advised fund is a philanthropic tool—not unlike a private foundation—with significant tax advantages and considerably less hassle. A donor-advised fund at DJCF/SWCF exists in the context of our community foundation and provides optimal flexibility and convenience for charitable giving. From the establishment of the account to the practical day-to-day administration of the grant-making process, we provide services that allow donors to focus on the joy of giving.

Benefits include:

- Contributions to the fund can be made at any time, in any amount.
- Donors may ‘advise’ DJCF/SWCF of their charitable intentions on an ongoing basis.
- Options for charitable tax deduction in a given year, or extend donor gifts to various charities over several years.
- A meaningful way to engage future generations in a family’s philanthropy.
- Confidential, real-time access to the MY DJCF/SWCF fund portal, with grant-making functionality at their fingertips.
- Team of specialists available to assist at every step along the journey.

Planned Giving Vehicles

Some of the greatest opportunities to make significant charitable contributions occur while people are making other major business, personal and financial decisions. Such “planned giving” or “deferred giving” can be executed, for example, when a donor writes or revises a will, or creates a charitable trust. In each of these situations, planned giving represents an opportunity to include a philanthropic legacy in the plan for achieving business or personal goals.

DJCF/SWCF has a team ready to collaborate with donors and their tax and legal advisors to create a legacy using wills and living trusts, endowments, scholarships, retirement plan gifts, charitable remainder trusts, charitable lead trusts, charitable gift annuities and more.

Nonprofit Agency Partners

Creating an agency fund is a simple and efficient way to establish donor-designated custodial and endowment funds. DJCF/SWCF is honored to extend our expertise in advanced planned giving vehicles to agency partners, to facilitate their direct receipt of planned gifts of various types, including cash, appreciated stock or real estate.

Benefits include:

- Advance the agency’s mission through a sustainable source of income from earning distributions from endowments.
- Access the investment pool and expertise of DJCF/SWCF’s professional and disciplined management of funds, including asset allocation, spending policy advice, and fiduciary oversight.
- Apply for short term financing solutions at competitive interest rates.
- Special projects and funding needs are promoted among our donor-advised fund holders within the MY DJCF/SWCF portal and publicly on our website.

Partnerships Built on Trust & Respect

DJCF/SWCF invites you to discuss your philanthropic objectives with our team. All discussions are strictly confidential. We look forward to working with you and your advisors to determine the most effective way to achieve your individual charitable goals and anticipate any expertise or information that may be required for a particular transaction.

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