

PHILANTHROPIC TRAINING WHEELS FOR FAMILIES LEARNING TO GIVE BACK

Some things take a little practice and guidance. Riding a bicycle is one. Giving back is another. Once you learn how to do either, a whole new world opens up to you.

The Philadelphia Foundation can serve as your family's philanthropic training wheels.

We have resources to serve you no matter what your age is or how old your children are.



We offer the following:

• THE RIGHT VEHICLE

We can include your family members as they transition from the “giving back” equivalents of tricycles to training wheels to full-sized bicycles with multiple gears. You may want to start with a conversation with a toddler about the value of sharing. Young children may want to help vote among the options we provide on where your grant dollars could go. Teens can come with you as you visit organizations to see your grant dollars in action. Young adults may take part in formal meetings for fund advisors or become official fund advisors so they can make online grants themselves.

• A GUIDING HAND

Since 1918, we've helped hundreds of donors get settled comfortably and securely in the driver's seat. We're ready to answer questions, on an age-appropriate basis, about such topics as tax benefits, investment options for your fund and how to find effective organizations that match your interests.

• EASY PEDALING

If you have a Donor Advised Fund, there's no rush to “get up to speed” before you or members of your family members are ready to make a grant. That's because once an established fund reaches the minimum balance, there's no year-end deadline or

stipulated amount you must give away annually (unlike a private foundation). And when you are ready, we'll help with research to make sure IRS regulations are met, along with issuing checks and reviewing reports on how the money is spent.

• BALANCE

What you want to accomplish with your fund may change as you get older, and we can help you keep your balance as those priorities shift. We also offer Charitable Gift Annuities and Charitable Remainder Trusts -- options that may be more appealing as you approach retirement because they allow you to help support your preferred nonprofits or causes while generating immediate income for you.

• A SMOOTH PATH

Giving back is fun! The more you do it, the better you understand how rewarding it is for you and how meaningful it is for those who receive help. It's also very satisfying to teach members of the next generation that they too can make a difference.

Giving back really is kind of like learning to ride a bicycle – once you “get it,” you never forget how, and you always enjoy the fun of exploring where you can go next. Want to go farther and faster? [Contact us!](#)