



Establish a Fund to Organize Your Giving

Establishing your own personal or family foundation fund is easy. Just follow these simple steps:

1

Contact us (phone, e-mail or online) and we will provide an establishing document tailored to fit your needs.

Toll Free (866) 627-3440 • chumley@greaterhorizons.org
www.greaterhorizons.org > “My Funds” page

2

Complete the form and return it to us.

The form will ask you questions such as, “What would you like to name your fund?” and “Will anyone besides yourself be granting from the fund?”

3

We will send your **username and password** and you can begin managing your fund online.

4

Contribute to your fund with a gift of cash, stock (including publicly-traded, closely-held and mutual fund shares) or other alternative assets. You will get an immediate tax deduction.

When you contribute appreciated stock (or mutual fund shares held for more than one year), you immediately get the full fair market value for your charitable deduction and you’ll avoid long-term capital gains tax.

5

Your fund will receive the cash from your contribution, and you can begin granting to support your church, synagogue, alma mater, the arts, social services or any 501(c)(3) organization in the country.

We look forward to having you as a part of our family of giving. We hope you enjoy our custom products designed to enhance and organize your charitable giving. Our staff is here to connect you to the charitable causes you care about no matter where you live.

