



THE DALLAS FOUNDATION

Here for Good

85

years



a

s an active philanthropic leader in the Dallas community, The Dallas Foundation can support, educate and inform donors and donor families as they pursue individual quests to make charitable gifts that address vital community needs.



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Round Three

The Dallas Foundation
Visual Branding

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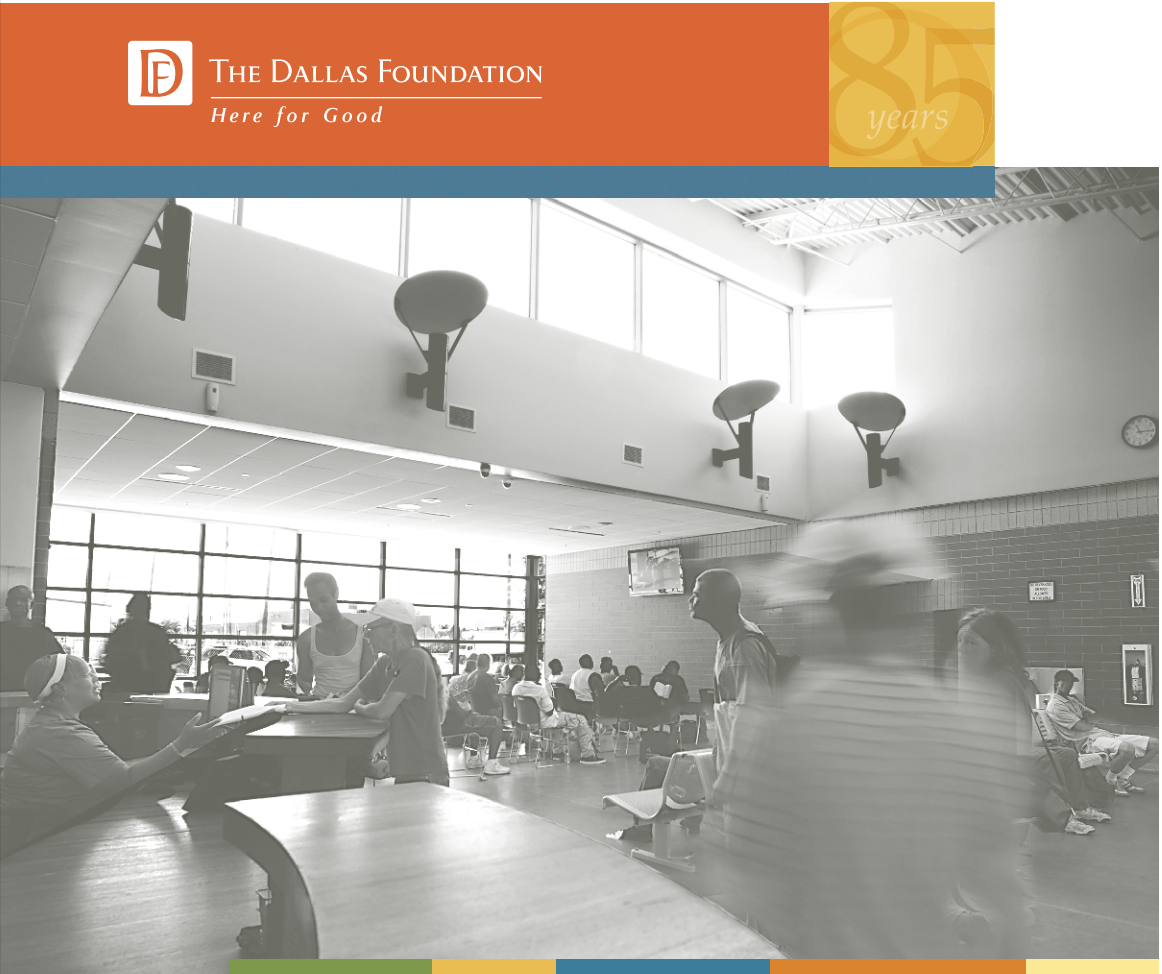
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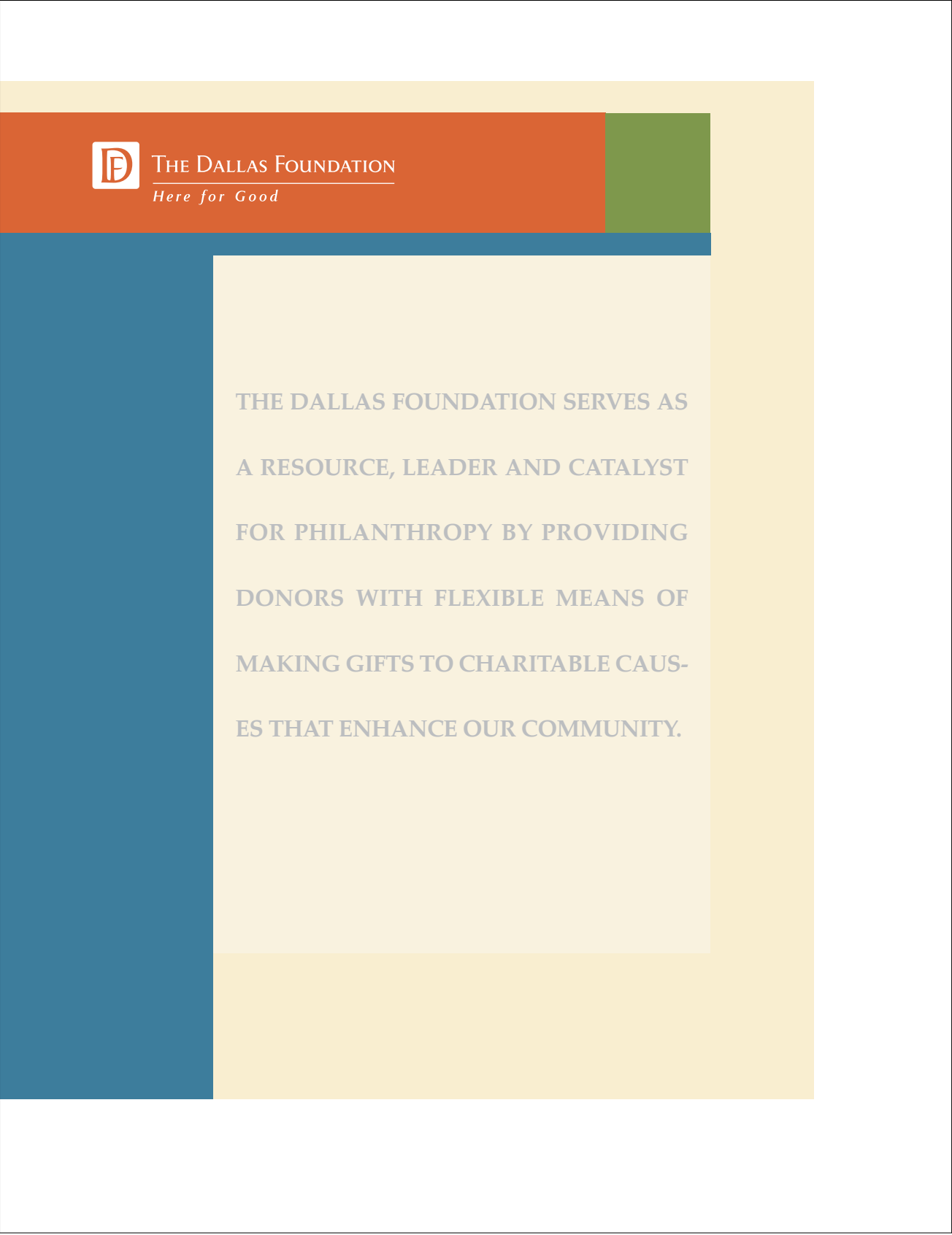
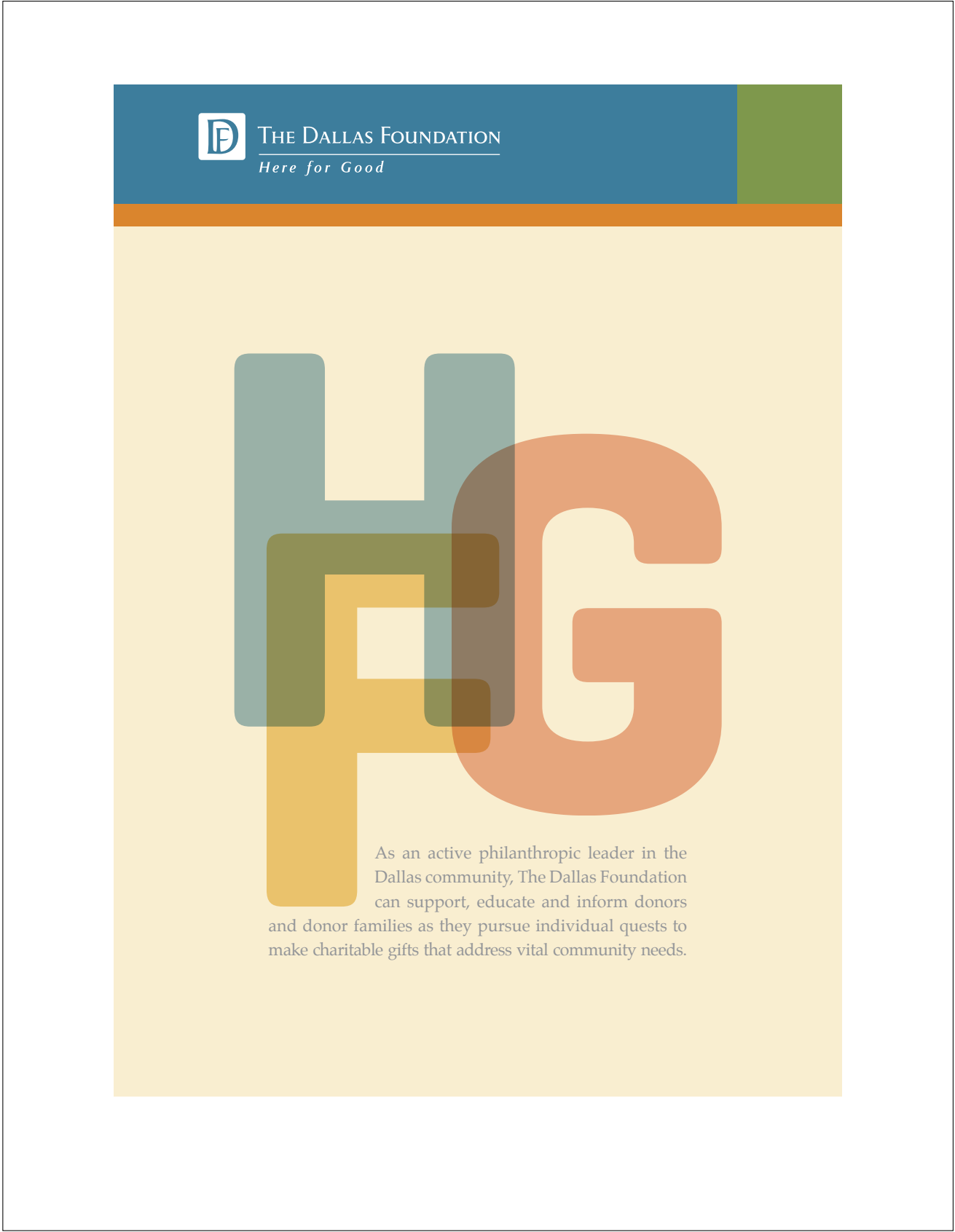
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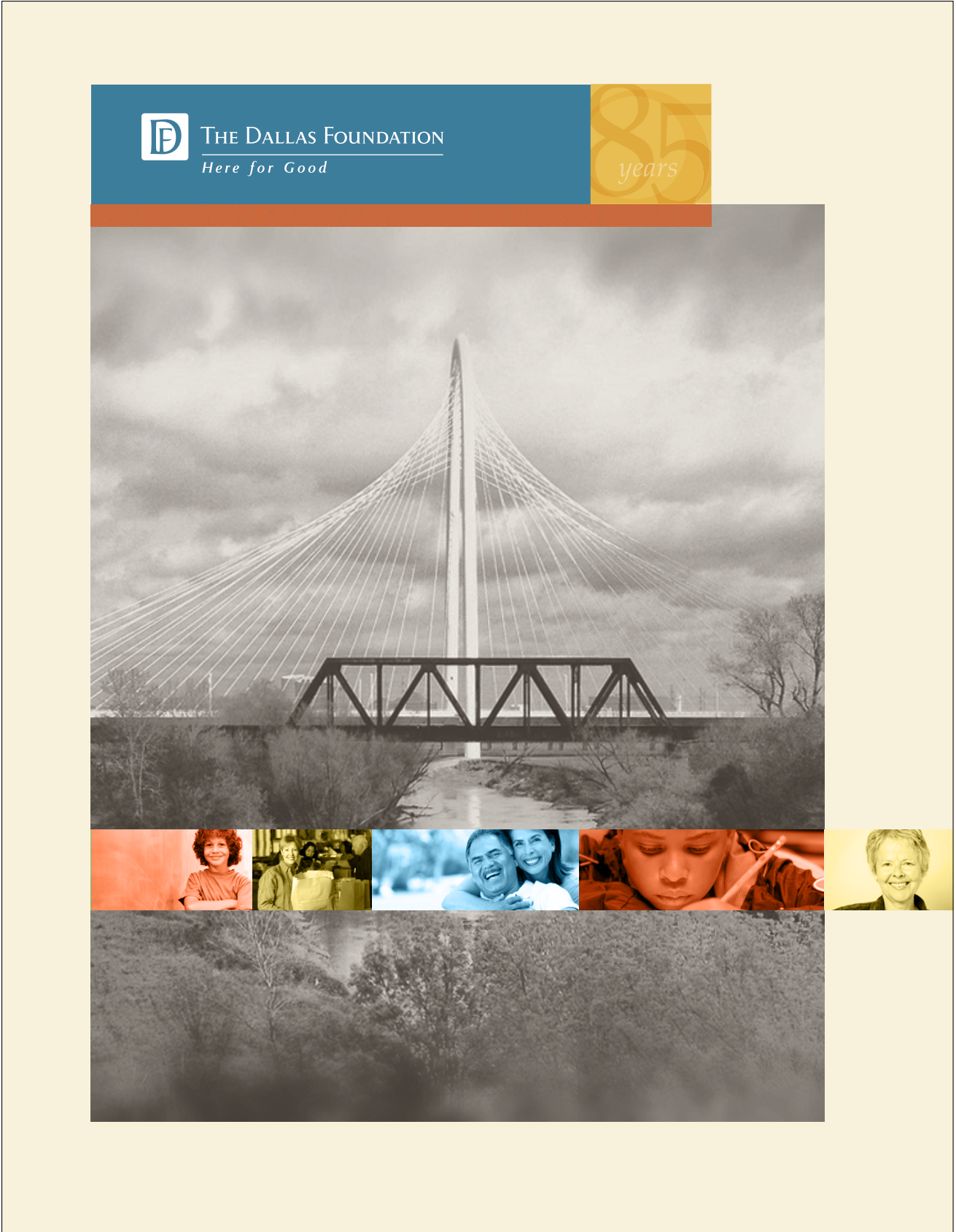
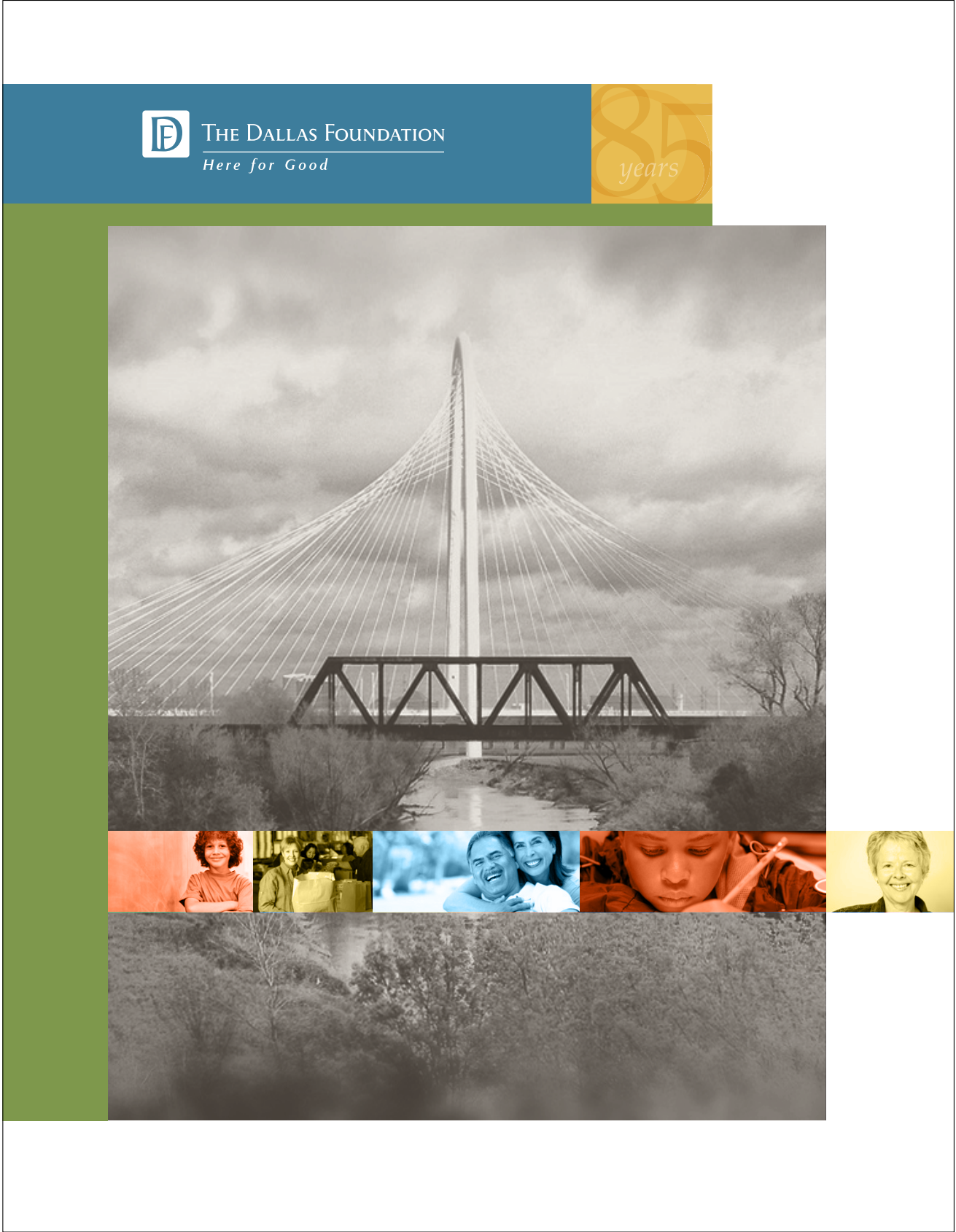
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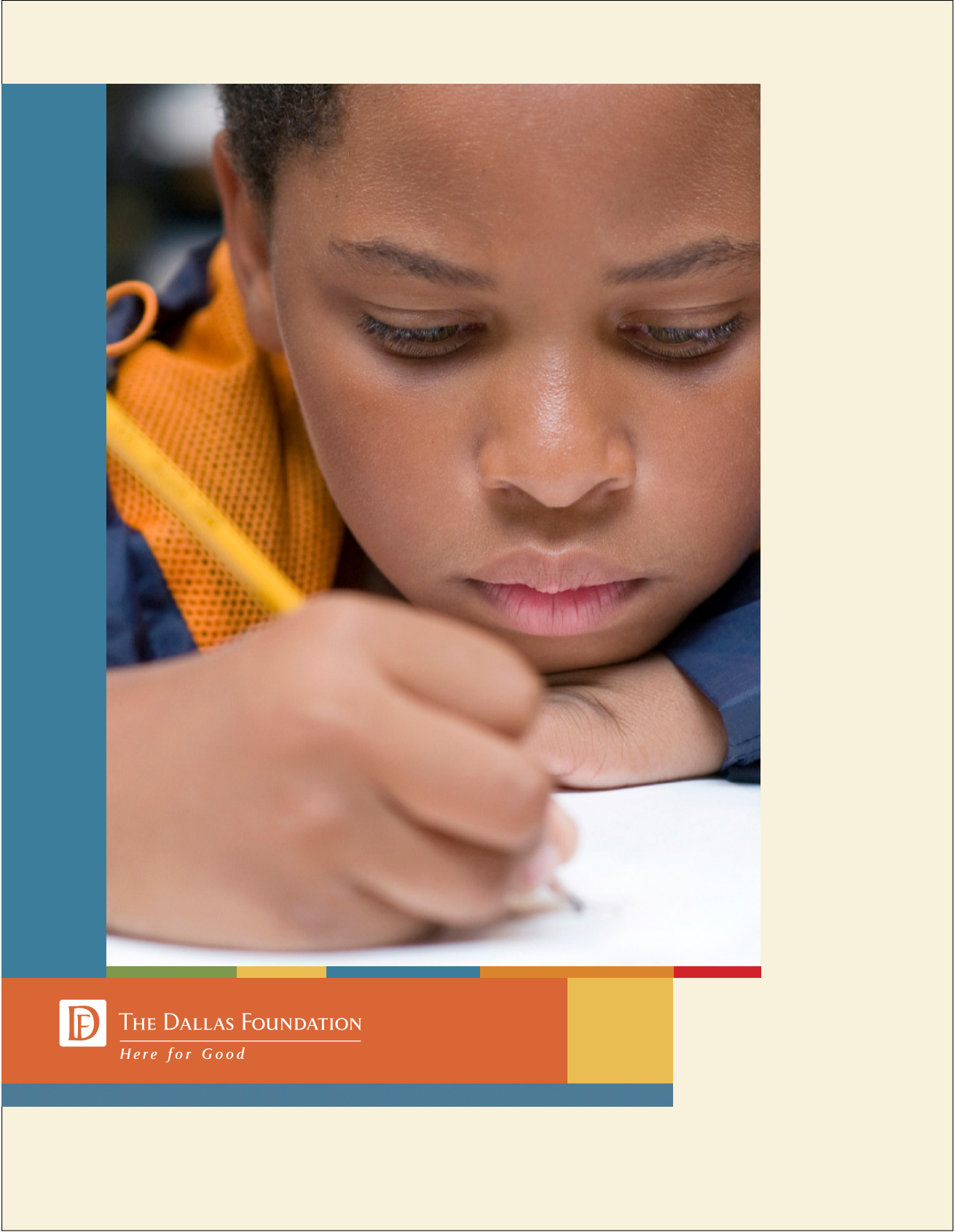
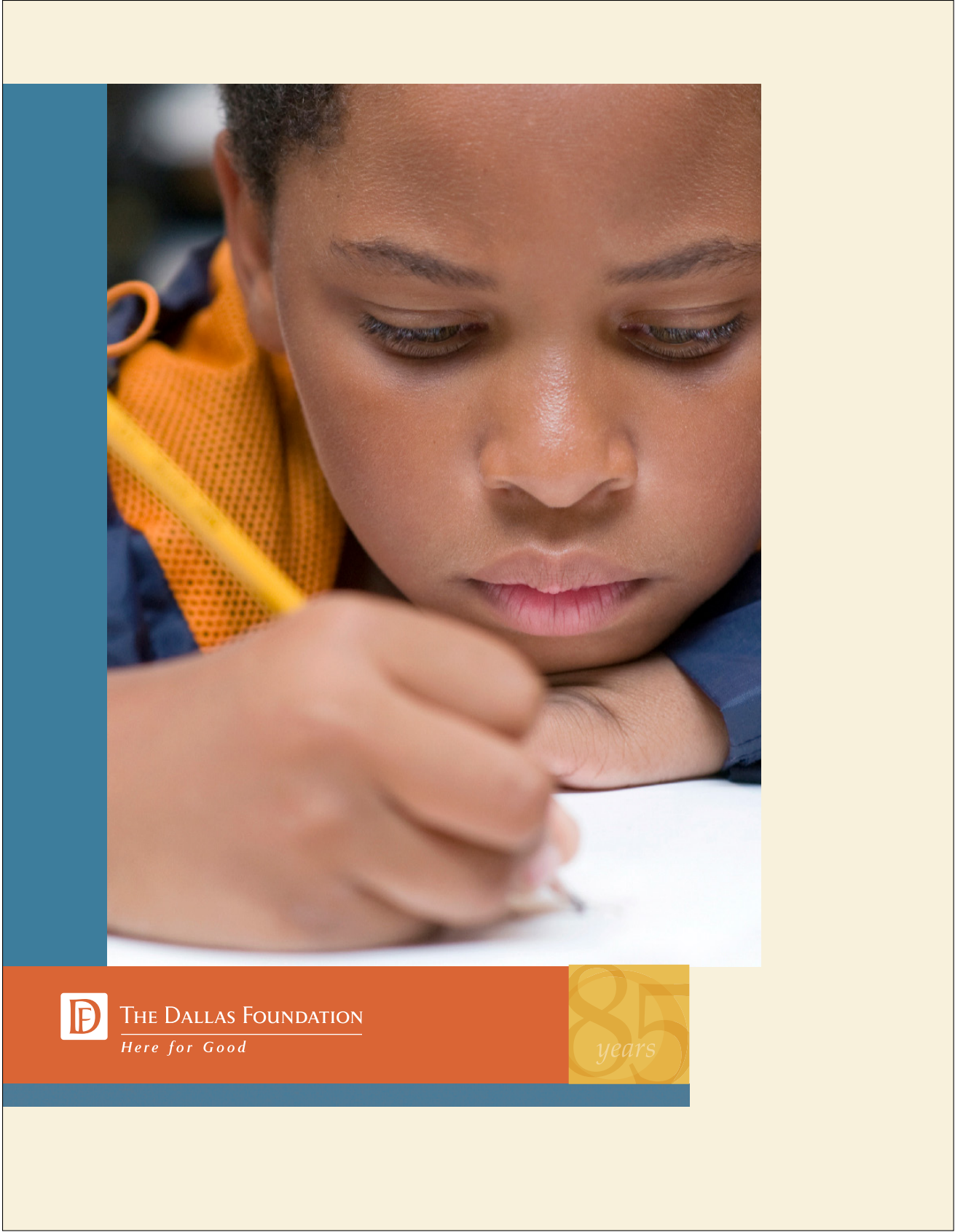
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September 24, 2013

The Dallas Foundation: Visual Brand | Mood Board

Brand Core

The Dallas Foundation, established as a community foundation in 1929, serves as a resource, leader and catalyst for philanthropy by providing donors with flexible means of making gifts to charitable causes that enhance our community.

Vision/Brand Positioning

To serve donors to The Dallas Foundation effectively and to further cultivate and support those donors whose charitable giving seeks to make Dallas better for all its citizens

Tagline

Here for Good

Audiences

Donors (individuals and families)
Advisors (financial and estate planners, wealth managers, CPAs)

Brand Personality

Classic, Timeless, Stable, Trustworthy, Tradition, Approachable, Gracious, Personal relationships, Collaborative, Forward-thinking, Professional , Experienced, Advocates, Impactful, Good stewards

Take-Away Message

As an active philanthropic leader in the Dallas community, The Dallas Foundation can support, educate and inform donors and donor families as they pursue individual quests to make charitable gifts that address vital community needs.

Key Messages/Copy Tone

Because of its deep roots in Dallas, and the civic involvement of its Board and staff, TDF is uniquely positioned to help you make giving choices that will make a difference in Dallas. TDF is committed to fully understanding the Dallas community’s challenges and opportunities in order to help you leverage your philanthropy to maximize impact. Charitable giving can be a positive, life-changing experience for you and your family

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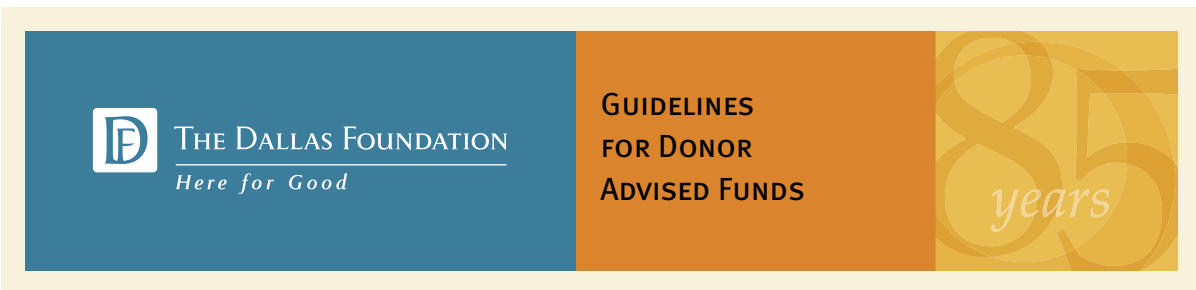
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The Dallas Foundation is very flexible in working with donor advisors about grants from the funds they establish. The policies that we have established to manage and direct donor advised funds reflect our responsibility to the community and the trust that generations of philanthropists have placed in us.

Our policies are also driven by our understanding of IRS rules and requirements. The following guidelines are provided to help answer some important questions about how a donor advised fund works.

How do I recommend distributions from my fund?

Recommendations of grants from donor advisors must be in writing, signed by the donor advisor or his designated representative by letter, fax or email. Donors may also register for online fund access through Donor Connection, which allows the donor to recommend a grant electronically. If the donor advisor does not specify the purpose of the grant, we will tell the charity the grant is for general operating support.

Is there a minimum grant amount?

No. You may recommend grants of any size. However, we request that the minimum size of grant recommendations be \$100.

What kind of organizations may I recommend for grants?

You may recommend nonprofit 501 (C)(3) public charities and religious institutions. Provisions of the Pension Protection Act of 2006 prohibit Donor Advised Funds from making any grants to individuals such as scholarships, emergency hardship grants or disaster relief grants. This includes checks written directly to an individual or checks written to an entity for the benefit of a specified individual. For example a grant to a university for the benefit of a designated student is prohibited. Donors are free to submit grant recommendations for public charities anywhere in the United States.

What about international charities?

We prefer to find a qualified U.S.-based charity that can receive and forward the contribution. We do have the ability, however, to work with a consultant who specializes in international due diligence of foreign charities. There is a small fee that would be incurred by your fund for this service.



THE DALLAS FOUNDATION

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AT A GLANCE



THE DALLAS FOUNDATION

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INVESTMENT
OPTIONS



THE DALLAS FOUNDATION

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FREQUENTLY
ASKED QUESTIONS



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INVESTMENT
RESULTS



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DONOR ADVISED
FUND AGREEMENT



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2014 BOARD
OF GOVERNORS



THE DALLAS FOUNDATION

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GUIDELINES
FOR DONOR
ADVISED FUNDS



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2014 ADVISORY
COUNCIL



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FEE SCHEDULE



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FORMER GOVERNORS
1929–2014

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