

# How to Start a Fund

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## FIND YOUR PASSION

This can range from highly specific—for example, an alma mater—to general in scope, such as “general charitable purposes.”

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## ALIGN YOUR PASSION TO A SPECIFIC FUND TYPE

Gilroy Foundation offers a number of fund options. Our knowledgeable staff is happy to advise you on the advantages of each fund type.

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## COMPLETE A SIMPLE FUND AGREEMENT

We provide a simple fund agreement that spells out the parameters of the fund and covers all legal and accounting requirements.

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## ACTIVATE THE FUND BY MAKING AN INITIAL GIFT

Gilroy Foundation can accept a number of assets to establish a fund. Gifts may include: cash, securities, real estate, personal property, bequests, retirement plan assets, and life insurance.

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## DESIGNATE ADVISORS TO YOUR FUND

Depending on the type of fund established, you should designate current fund advisors such as yourself and your spouse, and successor advisors such as your children. This information will be included in your Fund Agreement.

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## NAME YOUR FUND

Fund names may take virtually any form – your name, a family name, your corporate name, a cause-related name, or something else entirely. You may also choose to remain anonymous.

## THE PROCESS

### Once you establish your fund, you may:

- Add to the fund at any time in any dollar amount.
- Specify how grant disbursements should be acknowledged. You may make a grant using your fund's name, or you may remain anonymous.
- Make grants to any nonprofit organization across the United States.



**GILROY**  
FOUNDATION

[www.gilroyfoundation.org](http://www.gilroyfoundation.org)

*“Give Where You Live”*

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