How to Start a Fund

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

2. 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.

3. 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.

4. 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.

5. 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.

6. 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.

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.