

Donor Services

Service Options	All donor advised funds	Center for Family Philanthropy
Minimum Fund Balance	\$50,000	\$250,000
Grantmaking Services		
Philanthropic Advisor assigned to fund	•	•
Grant processing and due diligence	•	•
Online access to fund and Foundation information	•	•
No geographic limitations on grants	•	•
Philanthropic strategy sessions		•
Preparation of mission statement		•
Customized grant proposals within specified area of interest		•
Assistance soliciting, accepting and reviewing grant proposals		•
Grant award and denial letters		•
Grant monitoring and evaluation		•
Information and education services		
Smart Giving Education Series	•	•
Extra Wish and Smart Giving publications	•	•
Link to peers with related giving interests	•	•
Access to program staff's expertise	•	•
Personal site visits		•
Customized reports on a specific nonprofit or broad field of interest		•
Direct link to professional program staff		•
Legacy Services		
Deferred gift strategies	•	•
Unlimited successor advisors	•	•
Customized training for next generation		•
Family philanthropy meeting		•
Preparation of philanthropic legacy statements		•
Investment Options		
TCF Unitized Pool	•	•
TCF Money Market Fund	•	•
American Funds Mutual Funds	•	•
Recommend an investment manager		•