

Effective granting

Tailor and time your giving
to support the charitable causes
you care about most.

Make a greater impact

Philanthropists take special pride in the charities and causes they choose to support. A philanthropic account offers you the opportunity to tailor and time your giving based on what is important to you, allowing you to set goals, research, and recommend grants to charity more effectively.

Grant to charity in five easy steps

Grants may be recommended for a minimum of \$500, and all grants must support a public charity.

1. Choose a 501(c)(3) nonprofit organization

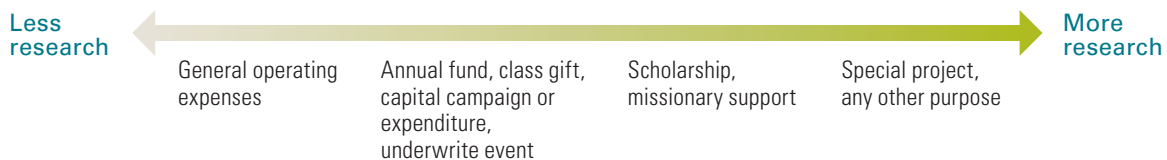
Research charities through our online system or provide us with charity contact information.

2. Decide on a grant amount¹

The minimum grant recommendation is \$500.

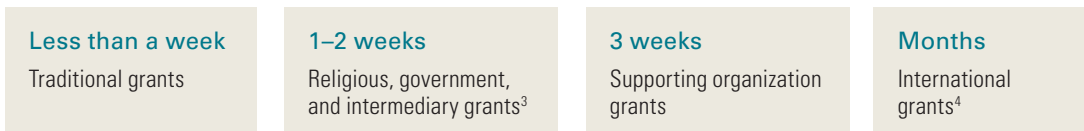
3. Select a grant purpose

Grants may support everything from general operating expenses or a capital campaign to events or specific projects. Each purpose requires a varying degree of research before a grant is issued.



4. Manage timing²

Send the grant check now, later, or on a recurring basis. The time to process a grant recommendation may vary based on the type of organization being supported. Nearly 80% of our grants are reviewed and issued in less than 2 days.



5. Consider recognition

Grants may be anonymous, fully attributed to your account, or something in between. Choose how you want to be recognized, if at all, each time you recommend a grant.

¹ Donors must successfully recommend at least one minimum \$500 grant every seven years. International grants and grants subject to tailored grant agreements may require larger minimum recommendations. Account advisors may not claim a charitable tax deduction for a grant made from Vanguard Charitable, even if the nonprofit organization provides a tax receipt.

² Timing may vary depending on grant purpose, type of organization, and seasonal volumes.

³ An intermediary is an organization based in the U.S. that supports international organizations and causes.

⁴ International grants are researched and approved on a case-by-case basis. Contact Vanguard Charitable before recommending an international grant.

The importance of charity due diligence

Traditionally, as a donor, you bear the responsibility to research charities you wish to support to ensure they meet their missions and allow for 100% tax-deductible gifts. Vanguard Charitable reduces that administrative burden by managing the review and distribution process for you.

Our grants team abides by IRS guidelines when reviewing your recommendations. You can be confident your contributions are helping compliant organizations in an efficient and timely manner.

Three factors considered before approving your grant recommendation

Type of organization

Every organization that receives our grants requires a unique review and approval process. We may need different documentation from a church or public library than the fundraising arm of a hospital or a charity that grants abroad. Consider your end goal before choosing what type of organization to support.

Purpose of grant

When you recommend a grant to charity, you also choose how the organization can use the money. Perhaps you wish to donate to a specific project or fund, or maybe you prefer to support a charity's overall mission, allowing the organization to choose how best to spend the grant and satisfy "the greatest need."

We work with you and charities to support projects that are important to you, while satisfying IRS requirements for granting. The simplest way to recommend a grant is also the most convenient for nonprofit organizations: Designate the charitable dollars for general operating expenses.

Impermissible benefit

Grants that underwrite events or allow for memberships require additional research to be approved. We must ensure the grant will not result in any benefits that would reduce the charitable deduction, as if you donated directly from personal funds. If the grant enables an individual to receive special goods or services, such as free tickets to a gala or some membership benefits, or it fulfills a donor's pledge, it cannot be approved.

When a grant is approved, we mail a check and a letter acknowledging the gift to your charity of choice. While the nonprofit organization cannot issue a tax receipt, if you choose to provide contact information, it may thank you.

For more information on effective granting, please see our *Policies and guidelines* booklet or visit vanguardcharitable.org/resourcecenter.

For help recommending a grant, contact us at questions@vanguardcharitable.org.



P.O. Box 9509
Warwick, RI 02889-9509

p 888-383-4483
f 866-485-9414

vanguardcharitable.org

Vanguard Charitable was founded by The Vanguard Group, Inc., as an independent, nonprofit, public charity in 1997. Although Vanguard provides certain investment management and administrative services to Vanguard Charitable pursuant to a service agreement, Vanguard Charitable is not a program or activity of Vanguard.