

CHARITIES AID FOUNDATION AMERICA

YOUR PASSPORT TO GLOBAL GIVING



■■■ committed to effective giving

**CAF**  
AMERICA

## YOUR PASSPORT TO GLOBAL GIVING

CAFAmerica exists to raise the level and quality of effective global philanthropy. We do this by offering a variety of grantmaking and advisory solutions designed to help individuals, families, corporations, and foundations make the most of their global philanthropy.

CAFAmerica helps donors and foreign charities answer these questions:

- Where can my charitable gift make a real difference around the world?
- How do I find a charity overseas that supports my vision, and then give to it?
- How can I use my expertise as well as my money to support charities that I care about?
- As a foreign charity, how do I grow my US fundraising?

Fundamentally, CAFAmerica is about growth: growth of communities, growth of potential, and growth of opportunity. Our growth has involved working with donors to support thousands of charities worldwide for 15 years.

Our vision is for a global society, in which the benefits of effective US philanthropy are widely accepted, actively measured, publicly appreciated, and continually actualized.

## TABLE OF CONTENTS

3	Why Use CAFAmerica for Global Giving?
4	Individuals, US/UK Taxpayers, Families, and Community Foundations
5	Companies
6	Professional Advisors
6	Foreign Charities
7	CAFAmerica Global Giving and Advisory Services for Donors
10	CAF International Network of Charities



## WHY USE CAFAmerica FOR GLOBAL GIVING?

A specialist in international grantmaking, CAFAmerica understands that cross-border giving can be challenging. As a US 501(c)(3) public charity, CAFAmerica uses its expertise in conducting due diligence on overseas charities, making us an excellent resource for US donors interested in funding charitable organizations and initiatives around the world. CAFAmerica makes international giving safe, easy, and effective for US donors while ensuring that contributions are fully tax-deductible.

### The CAFAmerica advantage

- Eliminates administrative barriers to global giving
- Facilitates tax deductible global giving for US and dual US/UK taxpayers
- Provides expert advice and analysis about foreign charities and societal issues
- Provides safe and secure international grantmaking and reporting

### SOLUTIONS FOR DONORS

CAFAmerica offers flexible grant making and advice that feature:

- **Due diligence and accountability.** Individual charity research to assess a charity's fit with a donor's objectives and interests. We make every effort to ensure that funds are used for legitimate charitable purposes.
- **Tax deductibility.** Contributions are eligible for the maximum allowable US federal income tax deduction and a tax receipt is provided for gifts made to CAFAmerica. Dual US/UK taxpayers can also benefit by using The CAF American Donor Fund based in the United Kingdom.
- **International grantmaking.** On receipt of donor gifts, CAFAmerica makes safe, easy and effective international grants to over 1,900 charities a year.
- **Grantmaking expertise** CAFAmerica helps donors formulate effective global giving strategies to enable them to make a difference in a community, country or region of the world.
- **Access to the CAF International Network of charities.** Donors have access to CAF offices around the world to help them formulate flexible in-country giving and advice.
- **Foreign charity visits.** For donors who are not sure whether to support a particular charity or initiative, CAFAmerica can arrange site-visits for donors to see first hand the issues and communities in which they are interested.

## SOLUTIONS FOR CHARITIES

CAFAmerica offers non-US charities a 'Friends of' Charity Fund and advice that features:

- **Cost effective fundraising.** CAFAmerica can help charities raise funds from US donors inexpensively and safely by establishing a Fund to collect gifts, a simple alternative to establishing a US charity.
- **Advice.** For charities that need advice on how to start fundraising in the United States, CAFAmerica can help identify donors and grant opportunities through our donor advisory services.

## Individuals, US/UK Taxpayers, Families, and Community Foundations

*"We were wasting a lot of money by missing out on the tax deduction we get from donating to CAFAmerica."*

—Kathy Coughlan, Coughlan Family Charitable Foundation

CAFAmerica offers solutions for individuals, families, and community foundations who are interested in giving abroad. Solutions are of an administrative and advisory nature, depending on the level of investment a donor is willing to make. They range from assistance in making a single gift to the design and implementation of a multi-year giving plan.

Solutions for individuals, families, and community foundations include:

- **Individual Donor Advised Grants**—single, one time gifts
- **Donor Advised Funds**— for long term and/or high volume giving; ability to pool gifts from multiple donors
- **Due Diligence Services**—charity validation independent of grantmaking
- **Donor Advisory Services**—consultancy to develop and enact giving plans
- **CAF American Donor Fund**—for dual US/UK taxpayers
- **Charitable Remainder Trust**—a tax effective mechanism for managing lifelong giving plans
- **Charitable Lead Trust**—a tax effective mechanism for managing lifelong giving plans

*For complete descriptions see page 7.*

## Solutions for Companies and Corporations

*"We were grateful to CAFAmerica for the caliber of the service they provide. Where CAFAmerica's help is most valuable is in the area of expenditure responsibility. With these international charities, we just don't have the time to check them out, and that's why CAFAmerica is such an indispensable resource."*

—Jacqueline Millan, Director of Corporate Contributions, PepsiCo Foundation

Corporations interested in giving abroad can use CAFAmerica international grantmaking and advice to support global corporate giving programs, international employee matching programs, and philanthropic development.

Solutions for companies and corporations include:

- **Individual Donor Advised Grants**—single, one time donations
- **Donor Advised Funds**—tax deductible global corporate giving programs
- **Matching Donor Advised Funds**—for international employee giving programs
- **Due Diligence Services**—charity validation independent of grantmaking
- **Donor Advisory Services**—develop a strategy and have questions answered about global giving
- **CAF International Network**—domestic grant making and advisory solutions in countries outside the US

*For complete descriptions see page 7.*



## Services for Professional Advisors

CAFAmerica can assist clients of legal and financial institutions to engage in international philanthropy. Working with the advisor, we can create flexible and personalized solutions that take into account a client's charitable vision, as well as legal and financial expectations.

Services for professional advisors and their clients include:

- **Individual Donor Advised Grants**—single, one time tax deductible donations
- **Donor Advised Funds**—for long term and/or high volume giving; ability to pool donations from multiple donors who want to give overseas
- **Donor Advisory Services**—the design and implementation of global giving plans
- **Briefings for professional advisors**—custom tailored information sessions for donors and advisors
- **Donor education and charity site visits**—arranged upon request

For complete descriptions see page 7.

## Services for Foreign Charities

*"We had originally planned to set up our own approved IRS charitable body in the US. However, this would have been complex and particularly costly, so CAFAmerica's 'Friends of' Charity Fund service was a perfect solution for us."*

—Jim Marshall, Director, The Vine Trust, Scotland.

CAFAmerica offers non-US charities a Charity Fund and advice that features:

- **Cost effective fundraising**—CAFAmerica can help charities raise funds from US donors inexpensively and safely by providing them with their own 'Friends of' Charity Fund to collect gifts, a simple alternative to establishing a US charity.
- **Advice**—For charities that need advice on how to start fundraising in the United States, CAFAmerica can help identify donors and grant opportunities through our advisory service.

For complete descriptions see page 9.

## CAFAmerica GLOBAL GIVING AND ADVISORY SERVICES

### INTERNATIONAL GIVING SERVICES

- **Individual Donor Advised Gift**—Donors can make a single, tax-deductible donation in cash or stock to CAFAmerica with a recommendation that a specific foreign charity, field of interest, or region be supported. Alternatively, CAFAmerica can recommend a charity that fits a donor's interests and philanthropic goals. Individual donations (\$500 minimum) can be made at any time by individuals, corporations, private foundations, and community foundations.
- **Donor Advised Funds**—Establishing a Donor Advised Fund (DAF) with CAFAmerica provides a convenient and tax-efficient way for individuals, corporations, or foundations to manage their cross-border philanthropy. The DAF is designed for donors who make a high volume of charitable contributions throughout the year and who require fund management services, including activity statements and online account access. A DAF is also useful for pooling gifts from multiple donors who want to give into one fund. All donations to a DAF are tax-deductible and grant suggestions to overseas charities can be made at any time. A DAF can be established with a minimum of \$6,000. Additional contributions may be made at any time, and of any amount. A minimum balance of \$5,000 is required to keep a DAF open, and it remains open as long as regular suggestions to support foreign charities are made by the donor.
- **Matching Donor Advised Funds**—Many corporations choose to match employee contributions and volunteer hours. Matched giving programs enable a company to support a large number of worthwhile causes while at the same time strengthening its corporate image among employees and the broader public. Designed to support corporate international employee matching programs, the CAFAmerica Matching Donor Advised Fund (MDAF) provides the flexibility to manage an international matched giving program of any type or size. By setting up an MDAF, corporations can tax effectively support the international philanthropic goals of their employees.  
A Matching Donor Advised Fund allows corporations to:
  - Set up a global matched giving program or a domestic matched giving program in another country.
  - Make matching grants to any legitimate foreign charity.
  - Match dollar-for-dollar or in a foreign currency, or with restrictions to suit a corporate program and/or philanthropic goals.

- Keep track of giving online with reports and statements on all matching grants made by CAFAmerica.

An MDAF can be established with a minimum of \$6,000. Additional contributions may be made at any time. A minimum balance of \$5,000 is required to keep an MDAF open, and it remains open as long as regular suggestions to support foreign charities are made by the donor.

- **CAF American Donor Fund**—The CAF American Donor Fund allows dual US/UK taxpayers living in the United Kingdom to claim ‘Gift Aid’ in the UK while still benefiting from a tax deduction in the US. The CAF American Donor Fund offers the perfect giving solution, allowing individuals to support charities around the world and ensuring they receive the appropriate tax benefits. The CAF American Donor Fund is the business name of Southampton Row Trust, Ltd., a UK-based charitable company registered with the Charity Commission in England and Wales. The Fund is wholly owned by CAFAmerica. As a result, donations to the fund are classified as gifts to a US public charity. This means that they qualify for a tax deduction in the US as well as Gift Aid benefits in the UK.
- **Charitable Remainder Trust**—With a Charitable Remainder Trust, a donor can make a gift to charity now but still benefit from the donation. The principal ultimately passes on to CAFAmerica upon the donor’s death while trust beneficiaries continue to receive the income. This allows donors to avoid any capital gains tax on the donated assets, while also receiving an income tax deduction. In addition, the asset is removed from the donor’s estate, reducing subsequent estate taxes.
- **Charitable Lead Trust**—A Charitable Lead Trust is a planned giving solution in which CAFAmerica receives property income or investment income while the donor is living. Then, the principal is transferred to the donor’s designated beneficiary upon the donor’s death.

## ADVISORY SERVICES

- **Donor Advisory Services:**
  - Develop and design long term international giving programs in line with donors’ goals.
  - Identify potential grantees and analyze and report on their work.
  - Conduct site visits on donors’ behalf to observe the work of individual foreign charities.

- Undertake research, and arrange visits for donors to see the work of charities they are most interested in.

- Monitor grantee reports to assess a charity’s effectiveness.

- **Briefings for professional advisors**—CAFAmerica frequently briefs professional advisors and their staff about the benefits of global giving, as well as how to interest current and prospective clients in international philanthropy.
- **Donor education**—CAFAmerica and its partners in the CAF International Network are available to conduct briefings for all types of US donors who are interested in learning more about the giving environment or about an issue in a particular country.
- **Charity site visits**—For donors who want to become more involved with giving, CAFAmerica can help find and support charities of their choice. We can arrange site visits to see the issues and communities donors want to support. Working with our foreign partner organizations, we can also arrange visits to charities and projects with which our partners may be working.

## SERVICES FOR FOREIGN CHARITIES

CAFAmerica services for foreign charities help non-US charitable organizations develop and strengthen their US fundraising efforts. Drawing on CAFAmerica’s expertise in helping US donors support foreign charities, we offer two main services to help foreign charities maximize their US fundraising potential.

- **‘Friends of’ Charity Fund**—This Fund is a cost effective alternative to establishing a US charity, and provides foreign charities with a Fund at CAFAmerica - an established international grant making charity in the United States. An unlimited number of donations of any amount can be gifted into the fund tax effectively at no charge to the donor.
- **Advisory Services for Foreign Charities**—CAFAmerica can work with a foreign charity to develop a US fundraising strategy, review funding proposals, and identify potential US funders. As with all CAFAmerica consultancy solutions, we tailor each project to meet a charity’s specific needs.

## Invest in CAFAmerica efforts to promote Global Giving

**Make a contribution to CAFAmerica today.** As a public charity, CAFAmerica works with US donors to help them fulfill their philanthropic goals all over the world. In order to carry out our mission of expanding borderless charitable giving, we need to reach out to more donors and foreign charities with information about our international giving and advisory solutions.

Direct support contributions enable CAFAmerica to reach new donors through a range of activities, including the following:

- Targeted outreach to donors and their advisors as we work to stimulate international philanthropy.
- An expanded range of solutions to suit US donors who want to give internationally.
- A broader geographic spread of foreign charities that would be eligible to benefit from CAFAmerica grantmaking.

CAFAmerica provides a vitally important service by making international philanthropy safe, easy, and effective for US donors. Contact CAFAmerica today for information about how a gift can help us assist deserving charities overseas.

## CAF International Network of Charities

Our donors are part of a larger philanthropic community. The CAF International Network charities help donors connect with other like-minded donors, while providing information and perspective to help inform their giving decisions.

Working with CAFAmerica means finding a global giving solution that is both flexible and fits with a donor's vision. It means benefiting from CAFAmerica's international grant making expertise, and giving donors a high level of personal service to assure them that their gift is going to be used safely and effectively.

The CAF International Network is committed to effective giving and grant making on a countrywide and international basis with offices located in Australia, Brazil, Bulgaria, India, Russia, South Africa, and United Kingdom. CAF offices and partners work with thousands of donors and charities to manage over \$3 billion of charitable funds.



## CAF Office Locations

**CAFAmerica**  
*Alexandria, VA*

**Charities Aid Foundation (UK)**  
*Kings Hill, Kent  
London*

**CAF Russia**  
*Moscow*

**CAF Australia**  
*Sydney  
Melbourne*

**CAF Bulgaria**  
*Sofia*

**CAF India**  
*New Dehli*

**CAF Southern Africa**  
*Johannesburg*



## About CAFAmerica

Founded in 1992, CAFAmerica is a US 501(c)(3) public charity dedicated to expanding borderless charitable giving among donors in the United States. We work to change the culture of giving by making international philanthropy safe, easy, and effective for US donors.

Contact CAFAmerica today to find out more about our array of innovative and tax-efficient giving solutions.

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