Whitefish Community Foundation is dedicated to fostering philanthropy, building endowments, and helping donors and nonprofits benefit our community.
A Donor Advised Fund offers individuals and families the ease and flexibility of giving, similar to a private foundation but without all the expense and administration. Gifts of cash or appreciated securities can be donated to set up your fund. You use your fund to make grants to charities over a period of time. Your gift can grow tax free through several investment options. You can also set up a Donor Advised Endowment Fund to build a fund that will give to charities in perpetuity and pass your giving tradition on to future generations of your family. WCF will do all the administration so that you can focus on your philanthropy.

WHY WORK WITH THE WHITEFISH COMMUNITY FOUNDATION?

WCF offers all the benefits of a larger, commercial Donor Advised fund provider including 24/7 online access to your fund, monthly statements, online grant submission, and more. We are always here to help you research a nonprofit and make your grant requests.

WCF offers several investment options to invest your fund for long-term grant making. Our funds are managed by Mason Investment Advisors and our funds are held at TD Ameritrade.

The Whitefish Community Foundation difference is our personalized service. We are very easy to reach and easy to work with. Our low, competitive, sliding scale administrative fee supports the important work that WCF does to benefit your local community.

WCF can expedite your grant requests and help you make grants to any 501(c)(3) charity in the country.

Contact Linda Engh-Grady at 406-863-1781 or email linda@whitefishcommunityfoundation.org for more information.

Support WCF’s work to benefit the Flathead Valley.
The Montana Qualified Endowment Credit offers donors a state of Montana income tax credit of 40% of the present value of a qualifying planned gift, up to a maximum of $10,000 per year for an individual ($20,000 if filing jointly).

Planned gifts allow a donor to maintain access to income during their lifetime, if desired, provide estate and tax planning tools, and build permanent endowments for Montana charities. Your gift can be directed to an existing, qualified permanent endowment fund, or set up a new permanent endowment fund.

To be eligible for the Montana Endowment Tax Credit, the state of Montana requires individuals to donate using a planned gift such as a deferred charitable gift annuity, charitable remainder trust, or paid-up life insurance. Your contribution is made directly to WCF. Your planned gift will benefit the charity or charities you choose in perpetuity.

If you would like to learn more about how you could get up to a $10,000 state tax credit and support your favorite Montana charities, please contact Linda Engh-Grady at 406-863-1781 or email linda@whitefishcommunityfoundation.org

Build long-term sustainability through endowments.
WCF is here to help you leave a lasting legacy according to your wishes. WCF ensures donors that their charitable dollars will be used the way they intended. If you have planned a gift in your will, trust, or other deferred gift mechanism with Whitefish Community Foundation as the beneficiary, please let us know.

A Legacy Fund is a charitable tool that allows you to set up a bequest to your community to direct your gift to the nonprofits that are aligned with your interests and passions. A Legacy Fund is a designated endowment fund that allows your gift to make annual distributions in your name to your charities in perpetuity. It is a wonderful way for you to leave a legacy to your community and be remembered for it.

You can designate a bequest in your will with your legal advisor to your named Legacy Fund. Simply complete the fund agreement paperwork with the Community Foundation so that we have your designated charities in place. If you later decide to change the designated charities you can update your agreement with the WCF. There is no cost to set up your fund.

Your Donor Advised Fund can also be set up to transfer to a Legacy Fund.

Please call us to learn more or set up your fund today.