



Cedar Street Charitable Foundation: A Smarter Way to Give

As a steward of your family's legacy, you play a key role in shaping its charitable impact. Aligning your philanthropy with tax benefits can enhance your giving strategy. Cedar Street Charitable Foundation (CSCF), managed by Crescent Grove Advisors, is a donor-advised fund that helps families achieve their philanthropic goals tax-efficiently and confidentially.

A donor-advised fund with CSCF offers flexibility—you contribute on your schedule and receive tax deductions when most beneficial. Just as importantly, you retain a meaningful role in the process, with input on investments and the ability to direct donations to the causes that matter most.

How the Process Works

ESTABLISH

Establish a donor-advised fund through Cedar Street Charitable Foundation with an initial irrevocable, tax-deductible contribution of \$25,000 or more in cash or publicly traded securities.

INVEST

Invest the assets in your donor advised fund for tax-free potential growth through the use of one of the six designated investment strategies.

GROW

Grow your fund by making additional contributions in increments of at least \$5,000.

GRANT

Grant recommendations of \$1,000 or more can be made to one or more charitable organizations that support your family's charitable giving strategy.

INSPIRE

Inspire your family to carry on your tradition of charitable giving in the future by designating successors of the fund, creating a legacy that will last generations.

Cedar Street
Charitable
Foundation:

15 Years

In Operation

+\$100 Million

Total Lifetime Grants

+\$150 Million

Total Lifetime
Contributions

\$70 Million

Total Year-End AUM

Figures as of December 31, 2025

Donor Advised Funds Simplify Charitable Giving

Benefits to Donors Include:

- **Simplicity.** Contribute to a DAF with cash or appreciated assets and receive an up-front tax deduction.
- **Planned Philanthropy Over Time.** While assets are held in the DAF, donors have full control of where and how they give, giving to charitable interests and specific organizations that mean the most to you.
- **Legacy Creation.** DAFs are an effective way to coordinate philanthropic giving with succession planning.
- **Professional Asset Management.** Contributions are professionally managed and invested, allowing for potential growth of assets.
- **Anonymous or Named Gifting.** Grants to other charitable organizations may be made anonymously or by recognizing the donor.
- **Tax-Advantaged Considerations.** Provides an immediate tax deduction, enables contributions to grow tax-free, and offers flexibility to support charities over time in a highly tax-efficient manner.
- **Not Limited to Individuals.** Individuals, families, and organizations may contribute to a DAF.

How We Compare

Cedar Street Charitable Foundation

Private Foundation

Initial Contribution

\$25,000

Generally \$1 million or more due to start-up and ongoing costs

Privacy

Names of individual donors and grants remain private

Required annual filings provide public disclosure of grants, contributions, trustees, salaries, and investment fees

Administration

We administer the fund for you based on your recommendations

You are responsible for recordkeeping, asset management and grant solicitations

Allowable Grants

IRS-qualified charities

IRS-qualified charities, direct gifts to individuals (e.g., scholarships), and other charitable intentions

To get started, contact us today at:

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