



Recognition and Benefits Provided to an Advisor to a Donor Advised Fund or a Family Foundation Contribution

There are specific IRS regulations regarding benefits that you can receive as the individual that advised or recommended that a contribution be made from your Donor Advised Fund or Family Foundation.

The Library Foundation cannot provide any benefit other than “incidental benefits.”

Depending on the amount of the DAF or family foundation contribution these incidental benefits may include:

- A subscription to the Library Foundation’s informative print magazine Bookmark.
- Advance notice of all Library Foundation programs.
- Member only access to recordings of Witte Lectures or Library Live posted on the Library Foundation website.
- A discount on Library Foundation programs.
- Invitation to the Library Leadership Circle Reception.
- Name recognition on the Donor Wall outside the Central Library.
- An invitation to the Summer Solstice New Member Celebration.
- Invitation to complimentary lecture receptions.
- Invitation for two to an exclusive curated look at the Library and its private collections.
- Priority Reserved Seating for all Witte Lectures and Library Live lectures.

Because of the IRS regulations, the Foundation cannot provide an advisor to a DAF or a family foundation with any benefit that would reduce the tax-deductible contribution amount if you made the contribution personally. These benefits include signed books and free tickets to the Witte Lectures or Library Live.

If you have any questions regarding this, please contact

Jerold D Kappel, CFRE
CEO@LibraryFoundationNB.org
949-717-3890

Thank you for your support of the Library Foundation of Newport Beach.