

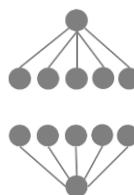
# Named funds

**A named fund is a ring-fenced charitable fund held by us on your behalf. Named funds are a great way for you to get directly involved in community philanthropy, without the cost and administration of setting up your own charitable trust.**

Named funds are created for various reasons: in memory of a loved one, to campaign for a cause close to your heart, as a way of demonstrating impactful CSR, or simply because you can and want to help. Whatever the reason, a named fund is often the most effective way of carrying out great charitable intentions.

Named funds come in two categories:

- **Donor-advised funds**, which channel the charitable gifts of a single donor, couple or small group to a portfolio of charities that match their passions and areas of interest
- **Charities-in-a-box**, which are a means for individuals or committees to champion a specific cause and raise funds and donations to benefit that cause



You decide how involved you are in decisions about how the fund is used, and the fund can be anonymous or named after yourself, a family member, a friend, a company or anything that is personal to you. Anyone can set up a named fund with OCF, as long as they are an Oxfordshire resident. We are experienced at working with professional advisors and their clients, philanthropic individuals or groups, bereaved families, steering committees, and corporate organisations looking for an effective CSR strategy.

## Benefits of a named fund

- **Authenticity:** fundholders enjoy the peace of mind of knowing that the fund is part of OCF's trusted, verified and established infrastructure, whose processes have been endorsed by the Charity Commission.
- **Efficiency:** donors avoid unnecessary hassle and wasted time, as OCF is responsible on behalf of the named fund for all the administration, reporting and governance as required by the Charity Commission and HMRC.
- **Growth:** the monetary value of donations is maximised thanks to OCF's eligibility to reclaim Gift Aid, access to match-funding schemes and professional investment management, alongside the pooled wealth of all our donors.
- **Impact:** charitable gifts have a wider and deeper impact in the community, as fundholders benefit from OCF's local knowledge and understanding of the charitable sector, and a 19-year track record of running a charity.
- **Longevity:** charitable gifts invested in named funds will benefit the community forever and not become dormant, as OCF will honour a fundholder's charitable wishes even after they passed away, or after the initial momentum to set up the fund has slowed.

## How it works



## EXAMPLES OF NAMED FUNDS

The following are some of the funds we currently hold, enabling others to give according to their interests and passions.

### Jane MacTaggart Fund

Jane makes an annual donation to her fund, using it to award grants themed around the causes that she feels most passionate about: mental health, depression and women's issues.



### Meech Centenary Trust

Manufacturing experts Meech have set up a fund to help young people to find work or get back into education in and around West Oxfordshire.



### Maggie Evans Fund

Maggie's family created this fund in her memory. The fund is used to help children discover a love of stories, languages and reading – which were Maggie's own passions.

