



Bernard & Helen Balick Fund for Helping Animals

Bernard and Helen Balick have been married for 50 years – and they've been animal lovers for a lot longer than that.

"When I was growing up, my dad kept hunting dogs, and Bernie had a favorite cocker spaniel when he was a youngster," Helen said. "I can't live without a dog. It's just an absolute necessity!"

Over the course of their marriage, the Balicks have shared their lives with a variety of rescued dogs and cats. They have also been generous to many different animal organizations. In 2003, the Balicks created the endowed Bernard & Helen Balick Fund for Animals at the DCF.

"Animals have been a huge part of our life, so we wanted a portion of our giving and our estate to support the care and protection of animals in our home state," Bernard said. "We trust the Delaware Community Foundation to ensure our wishes are met."

What is a Field of Interest Fund?

A field of interest fund is a tax-free investment account that generates a permanent source of charitable dollars that will make a difference on any issue you're passionate about, now and in the future. Establishing a field of interest fund typically results in tax benefits for you.

The Delaware Community Foundation (DCF) uses its knowledge of Delaware and its most critical needs to direct grants to organizations and programs that are making a difference in the area you select. Your gift stays forever flexible to meet community needs in your interest area — even as they change over time.

Your endowed field of interest fund becomes part of the DCF's permanent endowment for our community. You can be confident that the DCF will be here to honor and fulfill your charitable wishes in perpetuity.

HOW A FIELD OF INTEREST FUND WORKS

- **OPEN THE FUND** with an initial gift of \$15,000 or more in cash or other assets, such as appreciated stock, mutual funds or real estate. Most establishing gifts are tax deductible.
- **NAME THE FUND AND IDENTIFY THE FIELD IT WILL BENEFIT.**
The DCF team will work with you to define your field of interest – such as “the arts in Delaware” or “children in need” – to drive the change you wish to see.
- **PLAN FOR THE FUTURE** by working with the DCF to design a succession plan for your fund, defining how it is to be used after you are gone.
- **CHOOSE AN INVESTMENT STRATEGY** from the DCF’s investment pools, or ask about ways to keep your personal financial advisor involved.
- **EACH YEAR, THE DCF’S COMMITTEE OF ENGAGED, KNOWLEDGEABLE COMMUNITY MEMBERS AWARDS GRANTS FROM YOUR FUND TO ADDRESS THE GREATEST NEEDS IN YOUR AREA OF INTEREST.**
The DCF selects a committee that has the knowledge and relationships to identify opportunities to make a difference in your selected field of interest, enabling us to make powerful grants on your behalf.
- **ADD TO YOUR FUND AT ANY TIME** to take advantage of additional tax benefits while increasing the amount available for grants.
- **REVIEW YOUR FUND ACTIVITY ONLINE.**

The DCF handles all the administrative requirements of the fund, from investments to paperwork.

A field of interest fund at the DCF is a giving tool that empowers you to support a personal area of interest while recognizing that needs change over time. To begin the process of establishing your field of interest fund, please contact Joan Hoge-North, vice president for philanthropy, at jhoge-north@delcf.org or 302.504.5224.