

# Donor Advised Funds

Have you ever wished there was a way to give wisely and nimbly to numerous charitable organizations from one account?

A personal giving fund, known as a Donor Advised Fund (DAF), is the country's fastest growing charitable vehicle and may be just what you're looking for. Donor Advised Funds are an excellent choice for anyone who wants to simplify their giving and have the versatility to give whenever their heart feels inclined.

## How DAF's Work

- 1. Open and fund your Donor Advised Fund.** In addition to cash, you can subsidize your account with marketable assets including appreciated securities, real estate, stocks or business interests.
- 2. Grow your account.** Due to recent tax law changes, DAFs often carry graduated options to grow your account tax-free.
- 3. Give.** Whenever you wish to bless a charity from your DAF, simply recommend a grant from your account and the funds will be sent to support their work.



**A generous person  
will prosper;  
whoever refreshes  
others will be  
refreshed.**

Proverbs 11:25

# Here are a few more reasons why DAF's have become so popular:

**Flexibility.** Simply fund your account, then recommend charitable grants whenever you wish.

**Privacy.** You can make gifts anonymously through a DAF and delegate part of your giving to other family members if you prefer.

**Legacy.** DAFs can be set up to provide ongoing support for a charity after your lifetime and for generations to come.

**Simplicity.** You can name your DAF as a beneficiary in your will and update the list of charities to receive a gift without having to update your plan.

**Potential tax advantages.** In addition to receiving an immediate tax deduction, your invested assets will grow tax-free. You can also avoid capital gains on donated securities to increase your giving potential.

**Stewardship.** You can give financially with a minimal investment of your time — and giving to nonprofit organizations ensures you're making an impact that will last for generations.

## Global Partners

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This material has been prepared to provide general information regarding the subject matter covered. It is not intended to serve as legal, tax, or other financial advice. You should consult with your own attorney, CPA, or other advisor regarding your specific circumstance.

Many organizations have their own versions of a DAF, sometimes called Giving Funds, Stewardship Funds, or other proprietary naming conventions — but they all allow you to have significant impact from a single account. A DAF allows you to set aside money or assets, receive immediate tax benefits, and then control the timing of when and where you give.

**Donor Advised Funds have quickly become a favorite of so many because they make giving simple and enjoyable.**

