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Is a Donor-Advised Fund Right for You?

The flexible, tax-smart way to give on your terms

A Donor-Advised Fund, or DAF, is a type of charitable giving vehicle that allows individuals or organizations to make a charitable contribution, receive an immediate tax deduction, and then recommend grants from the fund over time.

How Donor-Advised Funds Work:



1. Contribution

You contribute cash, securities, or other assets to a DAF. Once you donate, you don't have to grant until you are ready. However, you receive an immediate* (some exceptions apply) tax benefit for the donation.



2. Investment

The funds you contribute can be invested, growing tax-free over time. You have the flexibility to recommend how the funds are invested, depending on which philanthropies you want to support.



3. Granting

Over time, you can recommend grants to qualified charities from your donor-advised fund. We handle due diligence on the charity and disbursing the grant.

What are the benefits of a Donor-Advised Fund?

Immediate Tax Benefits with Flexible Giving:

Maximize Tax Efficiency

Receive a tax deduction for the full value of your donation in the year it's made, grow your funds overtime, and then give when the time is right.

Strategic Giving

Enjoy the flexibility to spread out your donations over time, allowing you to support causes when it matters most to you.





Simplified Charitable Giving:

Centralized Management

A DAF acts as a single account for all your charitable donations, simplifying your record-keeping and making it easier to track your impact.

Potential Growth

Contributions to your DAF can be invested, potentially growing tax-free, which could enhance the amount available for charitable giving.

Create a Lasting Legacy:

Multi-Generational Giving

Use your DAF as a tool for estate planning, involving your family in philanthropy and ensuring your values are passed down through generations.

Privacy & Control

You can choose to make grants anonymously and recommend when and where your funds are distributed, allowing your giving strategy to evolve over time.



Is a Donor-Advised Fund Right for You? Look for These Scenarios.

Had a High-Income Year

Offset taxable income from bonuses, business sales, or stock options.

Own Appreciated Assets

Donate securities or real estate to avoid capital gains taxes and get a full market value deduction.

Are Planning for the Future

Create a lasting charitable legacy that can involve your family.

Give Regularly

Simplify and organize your charitable contributions over time.

45% of High Net Worth Individuals and **55%** of Ultra High Net Worth Individuals have a **DAF** because of the tax benefits and ability to make a meaningful impact.

*According to 2022 U.S. Trust Study of High-Net-Worth Philanthropy

