



Donor Advised Funds (DAF) FOR PROFESSIONAL ADVISORS

Manage your client's charitable investments, grow your practice, and *earn the loyalty of your clients' heirs* with a Donor Advised Fund sponsored by **iGiftFund**.

Financial Advisor Benefits

Benefits include:

- **Manage your client's charitable investments on your familiar platform in open architecture at all fund size levels.**
 - **Add long term, recurring revenue stream** to your existing book of business.
 - **Attract and retain** high-net-worth clients seeking philanthropic and wealth management services.
 - **Stem the loss** on assets that might otherwise be liquidated due to tax and estate planning decisions.
 - **Convert illiquid assets** (highly appreciated closely held stock, real estate, and life insurance) to assets under management.
 - **Convert AUM in other Donor Advised Funds and Private Foundations** to your investment platform.
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What is a Donor Advised Fund?

Donor Advised Funds are charitable-giving vehicles that provide simple, tax-smart and meaningful ways to help your client manage their charitable giving. Your clients can enjoy immediate and maximum tax advantages, make grants on a flexible time table, build their charitable legacy, and increase philanthropic funds for future grantmaking. Here is how it works for your clients

- **Establish the Fund:** Contribute a wide range of assets
 - **Enjoy** immediate and maximum tax benefits.
 - **Invest the Assets:** Your clients trust you to manage their charitable assets on your investment platform.
 - **Recommend Grants:** By using this simple tool Donors can recommend grants on a flexible timetable.
 - **Leave a Legacy:** Donors can use this tool to teach and pass on family values and to prepare their heirs, and to become successful, responsible and caring adults.
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Donor Benefits

The program provides numerous benefits for the donor:

- **Tax wise:** Your clients enjoy the maximum income tax deduction, avoid capital gains and estate taxes, assets grow tax-free.
- **Simple and fast:** Simple and fast solution that enables your clients to manage their charitable giving, similar to a private foundation (with significant advantages).
- **Efficient:** iGiftFund handles oversight and administration including, gift acceptance, grant processing, recordkeeping, compliance and tax reporting.
- **Private:** Your clients decide whether to keep their charitable giving private or allow it to be acknowledged.
- **Flexible:** Another advantage that distinguishes **iGiftFund's** DAF program is the type of assets we can accept. We are not in the business of quickly turning the assets your client contributes into some proprietary mutual fund. This means we can accept and hold gifts of closely held stock, real estate, life insurance policies, and other assets that other DAF programs will not.



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Identifying Client Opportunities

A Donor Advised Fund can be a solution for a client who:

- is experiencing an extraordinarily high income year.
 - will be selling a highly appreciated asset in the near future (closely held stock, real estate).
 - wants to support several charities through one substantial gift.
 - wants maximum flexibility to change the charitable beneficiaries over time.
 - wants to involve a spouse, children and grandchildren in charitable giving.
 - makes cash gifts to numerous charities, but would benefit by giving appreciated assets.
 - experiences fluctuating income but wants to maintain a steady level of giving.
 - is concerned about the complexity of a private foundation and lack of privacy.
 - wants to support a charity, but is not confident with the organization's investment management capability.
 - wants to keep his or her charitable giving confidential.
 - wishes to support a particular charity, but wants to ensure that the gift is used as he or she intended.
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Your role

iGiftFund allows you to keep your client relationship as trusted advisor and work in your usual way, i.e. in a brokerage relationship or a managed account relationship.

Steps in Setting Up a Fund

Setting up a fund is easy:

- You assist your client in completing **iGiftFund's** Donor Advised Fund application.
 - You send the completed application, and investment account paperwork to **iGiftFund**.
 - **iGiftFund** completes investment account paperwork and returns it to you.
 - You establish the new investment account (registered as **iGiftFund** fbo Smith Family Charitable Fund).
 - Client authorizes the transfer of assets to the new investment account.
 - **iGiftFund** sends client a gift receipt letter and instructions for secure online access.
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Why iGiftFund?

As pioneer of the national donor advised funds, iGiftFund is committed to helping you build this unique aspect of your wealth management practice with a range of experience, flexibility, and personalization that cannot be found elsewhere.

Fees

Administrative Fee

- **iGiftFund's** tiered administrative fee schedule is competitive in the marketplace. It is charged directly to the client's DAF, starting at 60 basis points of the first \$500,000, lower on larger funds.

Investment Management Fee

- The client's DAF is charged with the investment management expense associated with your role as investment manager.

For additional information, call or email Phil Tobin at 1-800-810-0366 or philtobin@iGiftFund.org