

# Donor Advised Funds

## A summary for Donors

Create a lasting legacy and make a difference in the lives that follow.



## Donor Advised Funds

**A simple, smart and meaningful strategy for creating your charitable legacy – a way to ensure that you, or someone you love will be remembered.**

### Here Is How A Donor Advised Fund Works:

- Choose from among a wide range of assets types then make a contribution to a fund in the name of iGiftFund for the benefit (FBO) your Fund (i.e. Jones Family Foundation).
- The gift qualifies for immediate and maximum tax benefits.
- The assets are placed in an investment account which your investment advisor can manage and where growth is tax-free.
- You recommend grants to your favorite charities on your own schedule.
- The fund can go on as your family's charitable legacy over successive generations.

### Benefits

- Immediate and maximum tax benefits.
- Simple and quick to setup – \$25,000 minimum.
- iGiftFund handles the administration and IRS reporting.
- You can contribute a wide range of assets including cash, marketable securities, restricted and privately held stock, real estate, life insurance policies and other DAFs.
- Works well as the beneficiary of a bequest, an IRA, a Charitable Remainder Trust, a Charitable Lead Trust or life insurance proceeds.
- Can support any eligible charity in the country.
- An effective parenting or grandparenting tool to pass on values.
- iGiftFund offers a level of independence, flexibility and personalization not available in most other programs.

### Typical Donor Scenarios

A Donor Advised Fund can be a solution if you are:

- Experiencing an extraordinarily high-income year or approaching retirement.
- Struggling with potential taxes involved with selling a highly appreciated asset.
- Questioning how best to support several charities over a number of years through one gift.
- Seeking flexibility to change your charitable beneficiaries over time.
- Wanting to engage your spouse, children, and grandchildren in charitable giving as a way to pass on family values.
- Concerned about the time and complexity in gifting appreciated investment assets to more than one charity.
- Experiencing fluctuating income that makes it hard to maintain a steady level of giving.
- Concerned about the cost, complexity and lack of privacy of a private foundation.
- Concerned that a large gift might overwhelm your favorite charity



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### You may consider a Donor Advised Fund if you:

- Want to ensure that you, or someone you love, will be remembered.
- Want to pass on the family values of giving to your children and grandchildren.
- Want to create your charitable legacy now and fund it while living and/or at the time of your death.
- Want the best tax benefits available.
- Appreciate creative solutions for tailoring your charitable legacy in simple, smart and meaningful ways.
- Want the assurance that your trusted advisor remains involved to ensure that your charitable legacy carries on over successive generations.

### Why iGiftFund?

- Affordability – iGiftFund’s Administrative Fees are the lowest in the industry. With savings of 25% to 50% or more, you will have more dollars for grantmaking
- You can recommend that **your investment advisor manage investments on your familiar platform.**
- Experience – Our team has 30+ years of collective experience in Donor Advised Funds, arguably the longest in the industry.
- iGiftFund offers individualized, concierge-level service.

### I’m ready to open a DAF, what’s next?

1. Complete the electronic DAF application available on our website here: [www.iGiftfund.org/forms](http://www.iGiftfund.org/forms).
2. Have your FA contact iGiftFund to request our Corporate Documents Packet by sending an email to [DonorSupport@iGiftFund.org](mailto:DonorSupport@iGiftFund.org). The packet has the information they will need to complete the investment account paperwork and investment advisory agreement for our signature.
3. Your FA will help you transfer the assets you will be contributing to the DAF’s investment account and will notify us of your contribution by sending an email to [DonorSupport@iGiftFund.org](mailto:DonorSupport@iGiftFund.org). Once we post the contribution, you can start recommending grants in [DonorView](#) (iGiftFund’s donor portal), where you can also download/print your gift acceptance letters for tax purposes.

### Contact Information:

Donor Support Services

[DonorSupport@iGiftFund.org](mailto:DonorSupport@iGiftFund.org)

800.810.0366 | 330.400.276

110 W Streetsboro St, Ste 2A Hudson, Ohio 44236

[www.iGiftFund.org](http://www.iGiftFund.org)



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Updated 7/27/23