



Donor Advised Funds (DAFs) are a simple, smart and meaningful strategy for creating your charitable legacy - a way to ensure that you, or someone you love will be remembered.

DAF BASICS

- Minimum initial contribution of \$25,000
- Choose from a wide range of asset types, and make a contribution to a fund in the name of iGiftFund, for the benefit (FBO) of your Fund (e.g., Jones Family Foundation).
- Receive immediate and maximum tax benefits for your gift.
- The assets are placed in an investment account managed by your investment advisor, where growth is tax-free.
- You recommend grants to your favorite charities on your own schedule.
- The fund can continue to support your family's charitable legacy across generations.

DAF BENEFITS

- Immediate and maximum tax benefits.
- Simple and quick to setup
- iGiftFund handles all administration and IRS reporting.
- 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, IRA, Charitable Remainder Trust, Charitable Lead Trust, or life insurance proceeds.
- Can support any eligible charity in the country.
- Effective tool for passing on values to children or grandchildren.

A Donor Advised Fund may be ideal for you if you are:

Struggling with potential taxes related to selling a highly appreciated asset.

Experiencing an extraordinarily high-income year or approaching retirement.

Wondering how best to support several charities over multiple years with one gift.

Seeking flexibility to change charitable beneficiaries over time.

Wanting to engage your spouse, children, and grandchildren in charitable giving to pass on family values.

Concerned about the time and complexity of gifting appreciated assets to multiple charities.

Concerned about the cost, complexity, and lack of privacy of a private foundation.

Worried that a large gift might overwhelm your favorite charity.

TYPICAL DONOR SCENARIOS

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 your family's 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 to maximize 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 your charitable legacy carries on across generations.

WHAT SETS US APART

Unbeatable Fees – Save 25% to 50% or more with the lowest administrative fees in the industry.

Investment Management - You can recommend that your financial advisor manage the investments in your fund using the platform you're familiar with.

Direct Access – No call center. Donors and their financial advisors connect directly with us and our principals.

True Independence – We have no products to sell and focus solely on your philanthropic goals.

Industry-Leading Experience - With over 30 years of collective experience in DAFs, we have some of the longest experience in the industry.

I'M READY TO ESTABLISH MY DAF:

1. DAF Application - Ask your financial advisor to complete the electronic DAF application available on our [New FA Central](#) page to establish the DAF.
2. Review the [Program Description and Guidelines](#) and sign your DAF Application - After your financial advisor submits the DAF application, you'll receive an email with instructions to create your [DonorView](#) (online portal) credentials and sign your DAF via DocuSign.
3. Investment Account - Your financial advisor will submit the necessary paperwork to establish an investment account in the name of iGiftFund for the benefit of your fund.
4. Fund the DAF - Work with your financial advisor to make the initial contribution to your fund.
5. Recommend Grants - Start recommending grants in DonorView.

For Grantmaking info and tips visit iGiftFund.org/DonorHub.