



# iGiftFund

stewards for donor advised funds

DAF  
INFO SHEET

## ABOUT US

iGiftFund was founded by Phil Tobin, a pioneer in the field of Donor Advised Funds (DAFs). Phil has more than 35 years of experience in more than 4,000 DAFs worth in excess of \$4 billion.

iGiftFund is:

- an independent, national sponsor of donor advised funds. Unlike most national DAF sponsors, we can sponsor other types of donor funds that are eligible for Qualified Charitable Distributions (QCDs).
- laser focused on meeting the needs of its donors with boutique-like, personalized service.
- a partner with investment professionals, enhancing the relationship with their clients and earn the loyalty of the heirs.

## WHAT SETS US APART

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

**True Independence** – No pools or products to sell, no conflicts. We focus solely on your clients' philanthropic goals

**Fund Size, Investment Management** - The financial advisor can manage a fund of any size without minimum requirements.

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

**Tailored Fund Options** – Beyond DAFs, we offer customizable options like Designated, Field-of-Interest, Endowments, and Scholarships.

**Industry-Leading Experience** – We have the longest experience in the industry.

## RESOURCES AVAILABLE ON OUR WEBSITE

### **FA Central**

A resource for financial advisors, offering answers to common questions, a link to the DAF application, and a step-by-step guide to account set-up.

### **Donor Hub**

Specifically designed for donors and the grantmaking process.

### **The Financial Advisor's Guide to DAFs**

A comprehensive primer on DAFs, including their features, advantages, endowment vs non-endowment, and a comparison to private foundations.

### **The Donor's Guide to Donor Advised Funds**

Donor-focused version of the Financial Advisor's Guide.

### **Qualified Charitable Distributions (QCDs) You Can Manage**

Strategies to leverage the higher standard deduction and avoid taxes on RMDs.

# DAF INFO SHEET

## CONTACT US

iGiftFund.org

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## PRODUCT OVERVIEW

A Donor Advised Fund (DAF) is a simple, tax-efficient giving vehicle where the donor makes an irrevocable gift, receives an immediate tax deduction, and can recommend:

- You, as their trusted advisor, to manage the assets in the DAF
- Succession Plan options, including Successor Advisors
- Grants on their own timeline, with no 5% requirement

Think of a DAF as a charitable savings account for your clients to support their favorite causes. These, along with other donor fund options, are available to financial advisors and their clients through iGiftFund.

### Benefits include:

- Your client will save 25-50% in administrative fees with our industry-low rates
- Manage DAFs on your preferred platform, at any fund size. Act in a:
  - brokerage
  - or managed account capacity (discretionary or non-discretionary)

**Minimums:** \$25K to open a fund | \$100 for a grant

## IDEAL CLIENTS FOR DAFS/OTHER FUND OPTIONS

- Individuals selling appreciated assets or a business
- Clients with high income tax liability or general tax concerns
- Those seeking to replace or enhance a private foundation
- Donors wanting to avoid the complexity, costs, or lack of privacy of a private foundation
- Clients aiming to:
  - Create and pass on a family legacy
  - Make a lasting impact and be remembered
  - Prepare the next generation for successful wealth transfer

## OUR FEES

Assets	Fee	BPS
First \$500,000	0.45%	45
Next \$500,000	0.225%	22.5
Next \$1,500,000	0.15%	15
Next \$2,500,000	0.1125%	11.25
Next \$10,000,000	0.09375%	9.375
Next \$15,000,000	0.075%	7.5
Minimum	\$600/yr	

## DONOR BENEFITS

**Tax-Wise:** Maximize income tax deductions, avoid estate taxes and capital gains on appreciated assets, and grow assets tax-free.

**Simple & Fast:** A straightforward, tax-smart solution for managing charitable giving with more advantages than a private foundation.

**Affordable:** Industry-low administrative fees.

**Separate:** Separate tax from grant decisions.

**Efficient:** We manage all oversight and administration, including gift acceptance, compliance, grant processing and tax reporting.

**Private:** Donors choose whether to keep their giving private or allow acknowledgment.

**Flexible:** We accept a wide variety of gifts including cash, securities (including S- and C-Corp, LLC, LLP), real estate, life insurance, and more, including assets held in kind.

**Legacy:** Establish an endowment and teach future generations the value of philanthropy.

## ADVISOR BENEFITS

Manage your client's charitable investments on your familiar platform, across all fund sizes.

- Attract and retain high-net-worth clients seeking philanthropic and wealth management services
- Convert illiquid assets to managed assets
- Transfer DAFs to iGiftFund from other sponsors that won't allow you to manage the investment
- Strengthen advisor role and earn client loyalty, including heirs

## ACCOUNT OPENING PROCESS

**Submit the DAF Application** - Complete the electronic application available on our [New FA Central](#) page to establish the DAF.

**Open the Investment Account** - Provide the necessary paperwork to establish an investment account for iGiftFund (non-profit corporation), please see step 2 on [New FA Central](#).

**Fund the DAF** - Let us know once the account is funded.

The steps provided above offer a general overview. For detailed instructions on the account opening process, our Investment Guidelines, and answers to common questions, please visit [New FA Central](#).

*Note: FAs don't need to enter into any agreements to use our services.*