

DAFs Made Simple

A donor advised fund (DAF) is a flexible, tax efficient way to support the causes you care about, on your own timeline. You may contribute cash or other assets, receive an immediate and maximum tax benefit, and then recommend grants to charities over time.

This allows you to separate the timing of your tax benefit from your charitable giving. You can contribute when it makes the most sense to you, then support the causes you care about on your own schedule.

DAF Basics

- Receive **immediate and maximum tax benefits** for your gift.
- Contributions to the fund can include a **variety of asset types**, including cash, appreciated securities, real estate, stock, and life insurance.
- **You recommend the financial advisor** you want to manage your charitable assets, and **iGiftFund engages your advisor** to manage the investment account.
- **Your charitable assets can grow tax-free**, giving you the opportunity to increase the amount available for future grants.
- **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.
- **Keep working with your trusted financial advisor**, who can continue managing your charitable assets alongside your broader financial plan for a more coordinated approach to giving.
- **Can support any eligible charity** in the country.
- Works well as the beneficiary of a: bequest, **IRA, Charitable Remainder Trust, Charitable Lead Trust, or life insurance proceeds.**
- **A meaningful way** to pass your charitable values to children and grandchildren.

WHEN A DAF MAY MAKE SENSE

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

- Looking to maximize the tax benefits of your charitable giving.
- Planning to sell highly appreciated assets and considering a charitable gift as part of your strategy.
- Looking for a simpler, more private alternative to a private foundation.
- Interested in donating appreciated assets without having to coordinate gifts with multiple charities.
- Experiencing a high-income year, approaching retirement, or navigating another significant financial event.
- Planning to support multiple charities overtime through one charitable account.
- Looking for flexibility to support different charitable organizations as your interests and priorities evolve.
- Interested in making a significant charitable contribution now while distributing grants overtime.
- Wanting to involve your spouse, children, or grandchildren in giving and pass along your family's charitable values.
- Looking to establish a charitable legacy that can be funded during your lifetime, through your estate, or both.

WHAT SETS IGIFTFUND APART

Competitive, Transparent Fees

A competitive fee structure designed to help more of your charitable assets remain available for giving.

Your Trusted Financial Advisor

Recommend the financial advisor you know and trust to manage your charitable assets while iGiftFund handles the administration, compliance, and grantmaking.

Personal, High-Touch Service

No call center. Work directly with an experienced team that gets to know you, your advisor, and your charitable goals.

True Independence

No proprietary investment products, investment pools, or giving agendas—keeping the focus on your charitable goals.

Experience You Can Rely On

Built on decades of charitable giving experience, with a team dedicated to you and your trusted advisors.

I'M READY TO ESTABLISH MY DAF

1. Connect with Your Financial Advisor

Ask your financial advisor to register with iGiftFund and initiate your DAF application.

2. Review & Sign

Review the iGiftFund Program Description and Guidelines and electronically sign your DAF application, which will also onboard you to the online portal.

3. Establish Your Investment

Your financial advisor will work with iGiftFund to establish the investment account for your DAF.

4. Fund your DAF

Work with your financial advisor to make your initial charitable contribution

5. Start Giving

Access the online portal to recommend grants, view fund activity, and manage your charitable giving.

For more information about iGiftFund's DAF Program visit: iGiftFund.org/granting



110 W. Streetsboro Street, Ste 2A
Hudson, OH 44236
330.400.2768 | 800.810.0366
ask@iGiftFund.org