

# DONOR ADVISED FUND



## WHAT IS A DONOR ADVISED FUND (DAF)?

A Donor Advised Fund (DAF) enables you to donate to one or more of your favorite charitable causes.

- ✓ You'll be able to see the current impact of your donation and also have the ability to name up to one more generation of successor advisers.
- ✓ You can also qualify how the recipient will be able to use your donation.



## HOW DO DAF PAYMENTS WORK?

You influence the strategy of how your gift is invested and donated to your charitable organization.

- ✓ A DAF is flexible to enable contributions and distributions at any time, as opposed to only at formation, or at death.
- ✓ You define and reorient directives for your money when you want.
- ✓ You avoid capital gains taxes on the transfer of appreciated assets.



## A DAF WORKS BEST IF YOU ...

- ✓ Have considered a private foundation but don't want to incur the costs and invest the extra time to create it.
- ✓ Want the opportunity to see the direct impact of your donations during your lifetime.
- ✓ Would like the ability to affect future donors.



## WHAT ARE THE BENEFITS OF A DAF?

A DAF operates in a similar capacity as a private foundation but avoids the expenses and administrative burdens.

A DAF provides many advantages, which include enabling you to -

1. Realize tax benefits on your terms.
2. Recommend donations on your terms.
3. See the impact of your giving during your lifetime.
4. Establish a legacy of giving without the cost of a family foundation.
5. Choose your donation recipient.
6. Qualify how the recipient can use your donation.



## A DAF MIGHT NOT BE THE BEST FIT IF YOU ...

- ✓ Are seeking income from the DAF.
- ✓ Do NOT want options to name multiple successors, including family members, non-profit grant recipients, or endowed giving arrangements.

For more information, please email or call our experts ~

**Dan Radcliff**

*Director, Organizational Investing  
and Deferred Gifts*

OR

**Lindsay Cart-Turner**

*Operations Manager, Organizational  
Investing and Deferred Gifts*

888-311- 6530 | [OI@eder.org](mailto:OI@eder.org)

### Other Giving Vehicles to Consider

- ✓ Charitable Remainder Unitrust
- ✓ Charitable Remainder Annuity Trust

- ✓ Charitable Lead Trust
- ✓ Endowment
- ✓ Immediate Charitable Gift