

Keys to Effective Charitable Giving

DONOR ADVISED FUND

The Legacy of a Foundation

The names have a familiar ring. They are the families and individuals who have established America's greatest Private Foundations. Through the vehicle of the Private Foundation, they have seen their philanthropic vision take shape, and to a great extent, have defined philanthropy.

Who could benefit from a Donor Advised Fund?

In many ways, the Private Foundation seems to be an ideal tool. It allows for involvement in a wide range of charitable and ministry ventures, while making it possible for you, the donor, to retain control over your giving decisions. And, while the Private Foundation may have benefits for those with very large assets, it is far from ideal for everyone.

A new strategy brings the lasting legacy of the Private Foundation to a wider range of individuals. It is known as the Donor Advised Fund (DAF). While rooted in the same broad charitable support and lasting impact as the Foundation, for many, the DAF offers even greater benefits and increased flexibility.

The Advantages of a Donor Advised Fund

For many families and individuals, the Donor Advised Fund represents a more attractive option than the Private Foundation when it comes to realizing charitable objectives. In fact, the DAF is a planning option that is increasing in popularity.



Name Recognition

Much like the foundation, the Donor Advised Fund makes it possible to take action today that will bear witness to your philanthropic wishes for years to come. And, since you, the donor, are invited to provide advice (hence the name), it serves as a lasting witness to your values and priorities as the one whose name adorns the fund.

Flexibility to Realize Objectives

Flexibility to Realize Objectives One of the major attractions of the Donor Advised Fund is that, like the Private Foundation, it is flexible enough to remain true to your charitable desires. By design, the DAF lends an attentive ear to the donor's charitable wishes. Depending on the DAF Administrators procedures, you may be able to choose your fund's investment strategy (conservative, moderate, growth, etc.). You can give to the charity(s) you choose now or over time. And, though the final distribution and administration rests in the hands of the ministry, you will be able to see your objectives and goals realized.