



# American Endowment Foundation

## Donor Advised Fund Summary for Donors



### Donor Advised Funds

A simple, smart, and meaningful way to help you support your favorite causes and charities during your lifetime and/or after your death.

- Donor advised funds (DAF) are the most popular charitable tool for donors at many levels of wealth
- Once donated, investments in DAFs grow tax-free until granted to charities
- Gift qualifies for immediate and maximum tax benefits
- DAFs enable you to donate anonymously if you wish

### Why AEF?

- Founded in 1993, AEF is the largest independent donor advised fund sponsor in the country
- Your advisor can manage DAF investments at any amount so that you receive consistent investment advice
- Simple and quick process to establish a DAF account for an initial \$10,000 minimum contribution
- Flexibility in accepting variety of simple or complex assets including cash, publicly traded securities, closely held stock, real estate, life insurance policies and more
- Personalized service. You can recommend grants online, by phone or mail
- Preferred DAF of hundreds of wealth management firms and banks
- Reasonable fees; much lower expense than private foundations or many other DAF programs
- You can recommend grants to charities throughout the country & overseas
- You decide when and how much you want to grant

### Typical Donor Scenarios

A donor advised fund can be a solution for people who:

- Experience an extraordinarily high income year or are approaching retirement
- Want their financial advisor to manage their charitable assets
- Struggle with potential taxes involved with selling a highly appreciated asset
- Question how best to support several charities over a number of years through one gift
- Prefer flexibility to change their charitable beneficiaries over time
- Want to engage spouse, children, and grandchildren in charitable giving as a way to pass on family values
- Are concerned about the time and complexity in gifting appreciated investment assets to more than one charity
- Have fluctuating income that makes it hard to maintain a steady level of giving
- Are concerned about the cost, complexity and lack of privacy of a private foundation
- Understand that a large gift might overwhelm their favorite charity

### Contact Information:

1-888-440-4233

[www.aefonline.org](http://www.aefonline.org)