



Donor-Advised Fund

CHOOSE WHICH NONPROFIT ORGANIZATIONS TO SUPPORT AND WHEN

A Donor-Advised Fund organizes all your giving through one expertly managed and cost-effective vehicle. You choose which organizations to support, how much to distribute, and when. If you want ideas and advice, our philanthropy team will provide them.

A Donor-Advised Fund is the right fund for you if you want to:

- Remain actively involved in your giving while we take care of the administration. A donor-advised fund can be a more cost-effective alternative to a private foundation.
- Recommend grants to any qualified nonprofit organization in the United States and in most countries abroad.
- Rely on our staff to help connect you with great organizations — making it easy and effective for you to support the causes you care about most.
- Involve your family members in your philanthropy.
- Designate your children, family members or others as advisors to your fund so they can recommend grants now or in the future.
- Make additional tax-deductible gifts of any amount into your fund at any time. You can also invite others to contribute to your fund.
- Choose how you want your charitable gift invested, with returns going back into the fund for future grantmaking.
- Be acknowledged for your contributions to organizations or choose to give anonymously.
- Go online to recommend grants, see your giving history, and learn about great giving opportunities.

The minimum gift to establish a Donor-Advised Fund is \$5,000.

Ready to do more with your giving? We're here to help you help others.

Please be in touch to discuss how we can help turn your charitable passion into action — and make your giving easy, rewarding and fun.

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