

Who is a Donor Advised Fund (DAF) right for?

A DONOR ADVISED FUND CAN BE A SOLUTION FOR A PERSON(S) WHO:

- is experiencing an extraordinarily high income year.
- will be selling a highly appreciated asset in the near future (closely held stock, real estate, a business, or something else).
- wants to support several charities through one substantial gift. – no longer writing multiple checks from your checkbook – one tax receipt
- wants maximum flexibility to change the charitable beneficiaries over time.
- wants to involve a spouse, children or grandchildren in their charitable giving.
- currently makes cash gifts to numerous charities, but would benefit by giving appreciated assets instead.
- experiences fluctuating income, but who wants to maintain a steady level of charitable giving.
- is concerned about the complexity or lack of privacy of a private foundation.
- wants to support a charity but is not confident with the organization's investment management capability.
- wants to keep his or her charitable giving confidential.
- wishes to support a charity but wants to ensure that the gift is used as he or she intended.

Ready to hear more? Give us a call for a personal conversation!

(330) 655-3580

