WHY GIVING MATTERS
Charitable giving is something to feel good about. Studies have proven time and time again that participating in philanthropy can boost your health, your happiness, your relationships, and your lifespan. Of course that’s in addition to all of the good it can do for different causes and communities. Giving as a habit can create a substantial impact of on the things you care about, now and for years to come.

WAYS GIVING MAKES AN IMPACT
While every donation helps, when a cause is important to you, you may want to do more. Where one-time spontaneous contributions can make a difference, starting a donor-advised fund can help you become more intentional with your giving. Growing assets within a DAF can help you give a gift that keeps on giving.

INVESTING FOR GOOD
There are many ways your gift can make a significant impact. Whether you’re passionate about education or want to support your community, every gift can matter more. Whether its the professional support you could provide to patients rattled with illness, or the empowerment you could give to the impoverished, your gift can change lives.

Scattered, one-time donations can help in times of crisis, but developing a personalized giving strategy can focus and strengthen the impact of your generosity, turning your meaningful gift into an ongoing legacy.

With donor-advised funds, our clients can see the impact they are making now in the causes they care about. They trust United Charitable to manage their charitable assets so that they can continue to make that impact for as long as possible.

—Jan Ridgely, Chief Executive Officer
United Charitable is a non-profit organization that helps wealth advisors, donors, and charity ambassadors make a greater impact with their giving.

We work closely with financial advisors and their clients to increase a donor’s ability to do more with their contributions while minimizing their tax liability through charitable giving vehicles, like donor-advised funds.

“As a non-profit public charity, we speak philanthropy as a first language. We consistently work to merge the goals of our programs with the intentions of our donors for the benefit of both.”

We are your trusted philanthropic advisors for the lifetime of your gift, working with you and future generations to create a legacy of giving that is grounded in our best practices and sustained by our ongoing support and education.

**WHY DONOR-ADVISED FUNDS**

An investments in your long-term legacy

Through Donor-Advised Funds, charitable contributions can be both compassionate and smart. The customizable charitable planning solutions at United Charitable help you maximize the joy of giving while simplifying the need for management and tracking. We develop your charitable plan, manage the distributions, and aggregate the relevant tax information so you can focus on the joy you will bring and the new longevity of your gift.

**Benefits of a Donor-Advised Fund:**

- United Charitable works with your current trusted wealth advisor, ensuring your DAF works in synergy with your existing and future financial and estate plans.
- Donors can gain prestige without any of the administrative burdens.
- More charitable funds are available for philanthropic use because all assets grow tax-free inside the investment DAF.
- When you engage family members in philanthropic planning and establishing distributions together, you help create a family legacy of generosity for multiple generations to come.
- Aggregating your charitable giving allows you to more meaningfully engage with the causes you care about while receiving the tax benefits of “bunching” gifts.

Many of our clients appreciate the simplicity of a donor-advised fund. They can give to a variety of causes with one contribution, highlighting their charitable interests and the interests of the children and grandchildren. It becomes an excellent vehicle to drive home the importance of giving now and giving in the future.

—Jan Ridgely, Chief Executive Officer

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