What Charity Ambassadors Need to Know

What is a Donor-Advised Fund?

Donor-Advised Funds are philanthropic vehicles established under a public charity that allow donors to give a relatively small contribution (valued at $25,000), that yields an immediate tax benefit to the donor while creating flexibility to recommend grants over time.

Why Advisors Work With Us

We understand the trust-based relationship Wealth Advisors have with their clients and we work with advisors to maintain and compassionately grow their portfolios by increasing assets under management.

Our tailored approach and insights will help you deliver a better experience for your clients, increasing their relationship with you.

Starting a Legacy Today

Donor-Advised Funds can be established with one or more gifts that can be contributed during a person’s lifetime and/or as part of an estate plan.

People with modest incomes are able to support the causes they believe in now and for many years to come starting their legacies today.

A key feature of Donor-Advised Funds is that they allow donors to share the causes they care about with their children during their lifetimes, creating a more permanent personal impact.

Why Donors Like Donor-Advised Funds

- **Amplified impact** of charitable gifts
- **Guided** philanthropic planning
- **Multi-type** asset donations
- **Consolidated, flexible giving,** one-time or ongoing
- **Immediate relief** to tax burdens
- **Starting a legacy of giving now**

greater impact giving™
Starting the DAF

1. Donation
   Donor makes irrevocable gift of personal assets and immediately receives maximum tax deduction.

2. Donor-Advised Fund
   Donor names the fund. Assets managed by wealth advisor are invested to grow tax free.

3. Grant Recommendations
   Donor makes grant recommendations to qualified charities through United Charitable.

Donor Benefits of Donor-Advised Funds:

1. Deepened Relationships:
   Donors appreciate wealth advisors who can provide synergy between charitable giving and existing financial plans. The DAF opens the door to more meaningful discussions about estate planning.

2. Tax Benefits Maximized:
   Donors receive greater immediate tax benefits for a variety of assets.

3. Living & Leaving A Legacy:
   Donors make a palpable and sustained impact on the causes they care about.

4. Amplified Giving:
   Donors can grow their investments tax-free while they choose which charities they want to support.

5. Family Values Realized:
   Choosing charities and causes to support, donors can share the gift of philanthropy with multiple generations.

6. Donation Flexibility:
   Cash equivalents, marketable securities, partnership interests, and real estate offer greater gifting flexibility for donors.
Why Wealth Advisors Choose Donor-Advised Funds:

- **Speed and Ease of Use:**
  DAF set-up is quick, much like setting up a self-directed IRA. Using familiar investment tools and strategies, the learning curve for clients and backroom staff is flat.

- **Charitable Partners:**
  United Charitable provides Wealth Advisors with programmatic skills, expertise in charitable giving, and customer service giving you a host of value-added services for your donors in structuring and executing grant strategies.

- **Charitable Oversight:**
  United Charitable reviews grant recommendations and provides grant processing, fiduciary oversight, donor record-keeping, DAF reporting, tax reporting and IRS compliance.

- **Increased Assets Under Management:**
  Wealth Advisors can encourage philanthropy while compassionately growing the assets under their management. You stay involved in the investment side of your clients’ philanthropic activities after the gift is made.

- **Diversified Assets Under Management:**
  A broader range of asset types may be contributed to a DAF through United Charitable, making sure more of a client’s wealth is available for family philanthropy.

- **Prolonged Engagement:**
  If the donor’s DAF is designated as the charitable remainderman, a Wealth Advisor could continue to participate with the family’s philanthropy when the trust terminates, which would mean the DAF would serve as income beneficiary of a lead trust.

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- **Philanthropy Succession:**
  DAFs give Wealth Advisors a new strategic purpose to connect with the donor’s children, engaging them as donor advisors for the DAF.

- **Value-Added:**
  Charitable planning solutions distinguish Wealth Advisors and enhance their professional reputations with clients as informed, well-rounded Advisors.

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Engage Trusted Experts for Guidance

United Charitable works as your philanthropic expert that can make the most of donor gifts. We engage a donor’s existing Wealth Advisor, providing access to deeper philanthropic knowledge, and offering smarter charitable planning solutions for donors. Wealth Advisors trust our expertise and rely on United Charitable to provide timely, relevant information that can be easily understood by them and their clients.
Promote Flexibility for Clients

Impulse donations may work sometimes, but many donors need more flexibility when timing is tight, particularly near the end of the year. As a Wealth Advisor, you may wish to alleviate tax burdens as part of a healthy wealth planning strategy. Through DAFs, one-time gifts or ongoing contributions always give donors immediate tax benefits, regardless of when the donor chooses to grant from the DAF.

Help Clients Begin a Legacy Now

Donor-Advised Funds let your client begin their legacy now. An endowed fund will become a permanent, self-sustaining gift, whereas a non-endowed fund may grant distributions from the principal invested and the income, which may entirely deplete the fund at some point.

By working with United Charitable, we can help you and your clients choose a giving strategy that best meets the donor’s philanthropic and evolving wealth management goals.

Quick Facts:
Donor-advised funds can be established and grown from several types of contributions.

Common assets include:
- Marketable Securities
- Private Business Interests
- Partnership Interests
- Life Insurance Policies
- Cash
- Real Estate
- Art, Jewelry, and More.

In addition to their own value, DAFs can deepen the philanthropic influence of other charitable strategies, including life insurance policies, pooled income trusts, and more.

Partnering With Us

United Charitable is a public-charity that helps Wealth Advisors by providing expertise and resources that appeal to clients who aspire to greater impact philanthropy.

Our work helps donors realize their giving-goals, while partnering with their existing Wealth Advisors to sustainably give in a legacy-building way.

Through our ongoing support, we educate Wealth Advisors on ways their clients contributions can create greater tax relief while also promoting greater impact on the charities the donor cares about. Our solutions are fully customizable to your donor’s unique needs.

Helping You Help Donors

By empowering Wealth Advisors with the most relevant and user-friendly information in the field of giving, you will always have access to our resources and expert staff when you work with us.

When we work together, we turn donor passion into high impact philanthropy, personalizing the charitable giving process.

We are eager to help Wealth Advisors learn more about the field of charitable giving and the many benefits of smart philanthropy for their clients. Working together, we can create a greater impact.

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Our work at United Charitable creates a wider offering for Wealth Advisors, allowing them to align their clients’ philanthropic goals with their overall financial strategies. Advisors get the support they need. Charities see more of the funding they depend on. Donors make a greater impact.”

— Jan Ridgely, Chief Executive Officer

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