



# DONOR ADVISED FUND

## Charitable Giving

### United Charitable's Donor Advised Fund

Donor-advised funds (DAFs) are America's fastest growing giving tool. A DAF offers you a flexible way to manage your giving as if you had your own private foundation—without the heavy administrative burden, complex IRS oversight, and high cost of a private foundation. DAFs allow anyone to create a charitable legacy with the maximum tax advantages and enduring social impact.

## How it Works

Donor



### Assets to Fund Your DAF



cash



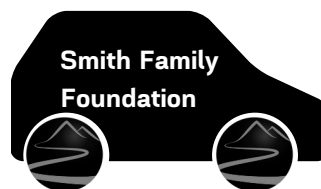
Complex Assets



Insurance



Investments



Name Your Foundation  
and  
Determine Your Mission

Fund Your DAF

Watch it Grow

Recommend Grants to  
Fulfill Your Mission

## Benefits



### Speed and Ease of Use

Opening your Donor Advised Fund is a quick and easy process. Onboarding can begin within a week of receiving an application. Recommending grants can be as easy as clicking a button.



### Efficient Record Keeping

United Charitable keeps a detailed record of your giving. Using your online portal you have 24/7 access to your account.



### Immediate Tax Relief

Once you contribute to your account, you receive the maximum tax relief allowable by the IRS. From there, recommend the grants you want without worrying about receiving receipts for each donation.



### A Tradition of Giving

Use your United Charitable Donor Advised Fund to build your legacy. Involve your family and watch how you can start a tradition of giving that can last generations.

\*United Charitable is not engaged in rendering legal, accounting, tax, or other professional advice and services. As such, it should not be used as a substitute for consultation with professional accounting, tax, legal or other competent advisers. Before making any decision or taking any action, you should consult your chosen professional.