

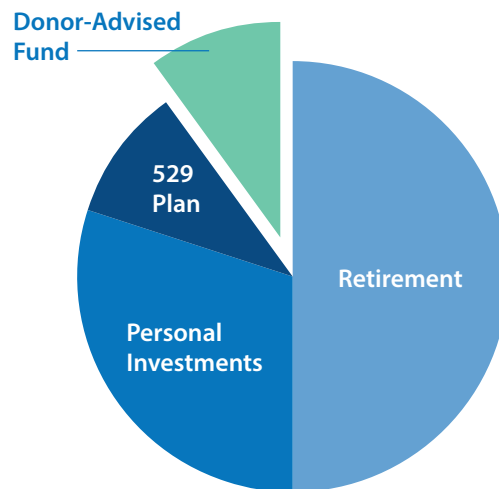
# DONOR-ADVISED FUNDS

## *Your Charitable Giving Account*

Just like you have retirement accounts, 529 plans and other investment accounts, a donor-advised fund is another piece of your financial planning picture. A donor-advised fund is a separate account for your charitable dollars.

Donor-advised funds have been around since the 1930s and are now the fastest growing charitable giving vehicle in the U.S.

### Sample Financial Portfolio



### Why choose a donor-advised fund over a private foundation?

- ▶ Less Expensive to Set Up and Run; No Need to Hire Staff
- ▶ Maximum Tax Benefits
  - Higher AGI Tax Deduction Limitations
  - Receive Fair Market Value Deduction for Gifts of Real Estate and Closely Held Stock
  - Avoid Annual Excise Tax Payments
  - Avoid Excise Taxes on the Sale of Highly Appreciated Gifts
- ▶ More Confidentiality; Ability to Grant Anonymously

MORE ➔

## How a Donor-Advised Fund Works

### GIVE

Give cash, stock or other assets to your donor-advised fund. Contributions are tax deductible.



### Avoid unnecessary limitations and minimums at Greater Horizons.

- No minimum required for the initial contribution.
- No minimum for additional contributions.
- No minimum grant amount.
- No limit to the number of annual grants.
- No limit to the number of individual successors or charitable beneficiaries.

To learn more, contact us at [info@greaterhorizons.org](mailto:info@greaterhorizons.org) or 866.719.7886.

*Greater Horizons does not provide tax, legal or accounting advice. This is for informational purposes only.*