

Let Us Help You

CREATE YOUR CHARITABLE LEGACY

You can structure your donor-advised fund for giving beyond your lifetime.

Our philanthropic advisors are experts in grantmaking and legacy building, and they can help you think through your priorities and goals to develop custom solutions that will sustain your charitable legacy.

We typically start with questions like these:

Who

Who will carry out your charitable legacy? The successor advisors to your donor-advised fund will make grants from the fund after your lifetime. Think about who you want to name as your successor advisors. Your children? Other family members? Friends? Your attorney? Or do you want to leave the grantmaking to our philanthropic advisors?

When

How long would you like your philanthropy to continue? Do you want to establish a spending policy to ensure giving can continue indefinitely? Do you want to outline when to make final grants from the fund?

How

Do you want successor advisors to have complete flexibility when making grants? Or do you want to set guidelines for future grants? For example, you may restrict grants to a certain geographic area or specific charitable causes.

There are many possibilities to consider for your charitable legacy. Here are some popular options among our donors.

- **Gather and unify.** Keep your donor-advised fund intact, and use it as a catalyst to gather your children or other successor advisors together. In this scenario, you determine whether successor advisors will make grant decisions independently, by majority or unanimously. You may also pick one representative who will work directly with us.
- **Divide and multiply.** Split your donor-advised fund into multiple donor-advised funds, so each successor advisor has their own fund. You might consider splitting the fund during your lifetime, so you can enjoy sharing your legacy.
- **Leave the work to us.** Our philanthropic advisors can manage the grantmaking from your donor-advised fund. We will work with you to document your charitable intentions to ensure we stay true to your goals after you are no longer able to do so.
- **Hybrid.** Customize the elements you want to include as part of your charitable legacy. We can make grants to your favorite charities immediately after you pass, and then let your successor advisors grant out the remaining donor-advised fund assets over time.

To learn more, contact us at info@greaterhorizons.org or 866.719.7886.