

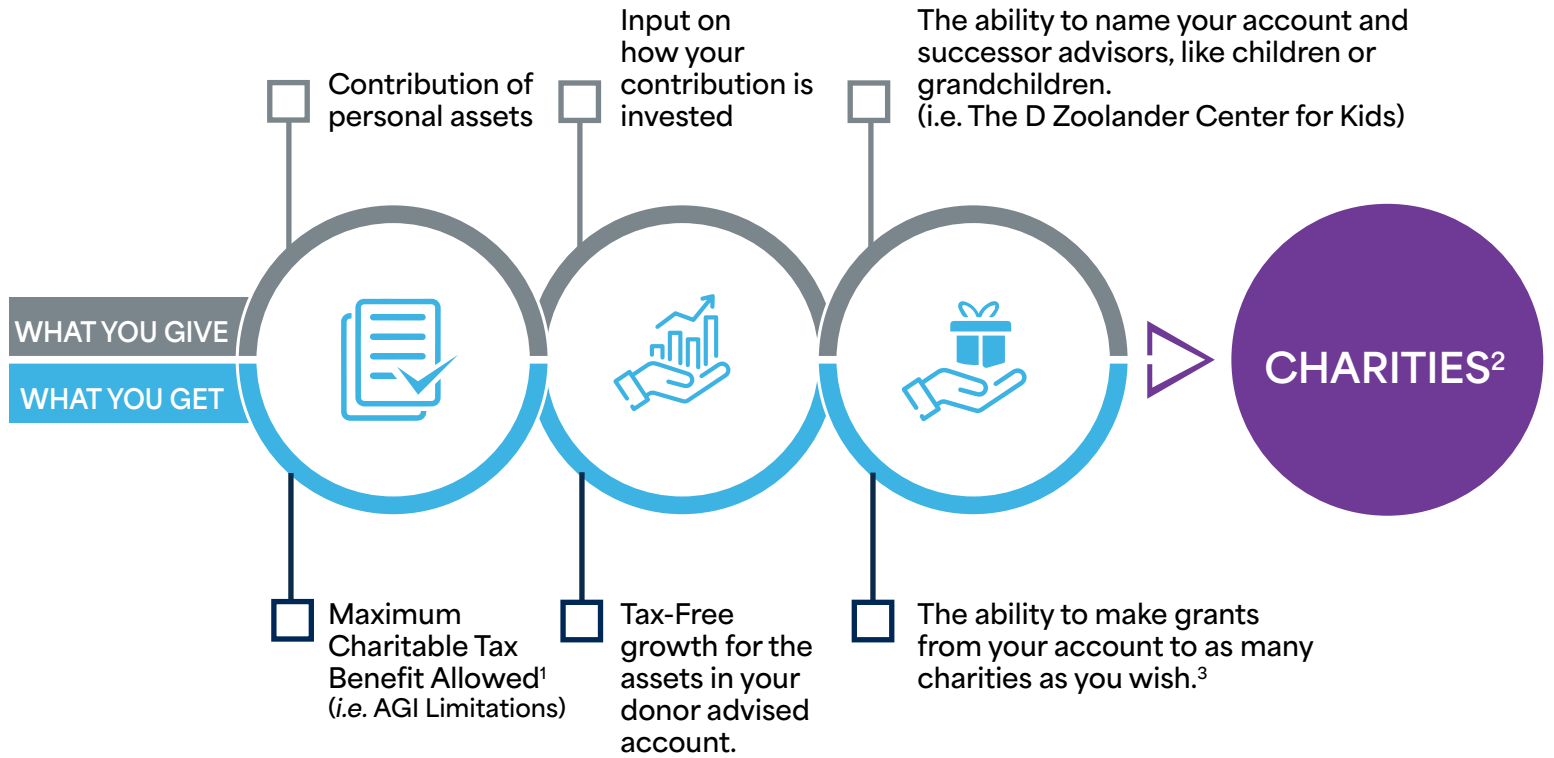
A BRIGHT IDEA

DONOR ADVISED FUND (DAF)



A SIMPLER ALTERNATIVE TO A PRIVATE FOUNDATION

A donor advised fund offers a middle ground between participating in a simple “checkbook charity” and starting a nonprofit foundation. A nimble cousin of private foundations, donor advised funds allow you to donate to your favorite charities and receive immediate tax benefits and deductions, but with less expense and set up.



Charitable giving is more meaningful and enjoyable when aligned with your own values, life experiences, interests, desire to make a difference in your community or even the world.

1. Subject to AGI limitations based on type of property contributed. Any amount that can't be deducted in the current year can be carried over and deducted for up to five succeeding years.
2. You may recommend grants to any combination of more than 1.5 million U.S. charities that qualify as 501(c)(3) public organizations under the Internal Revenue code.
3. As the donor, you can continue to make ongoing, non-binding recommendations to the DAF as to how, when and where grants from the fund should be made. As a practical matter, the DAF will generally follow a donor's wishes.

"Helping people doesn't have to be an unsound financial strategy." - Melinda Gates



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