



**Centralize Your Giving With  
Donor Advised Funds**

Your financial and charitable goals are a reflection of your commitment to support the future of your loved ones, charitable organizations you value, such as USA for UNHCR, and the greater community. But sometimes it can be difficult to keep track of the organizations you wish to support and the documents required to receive your benefits from charitable gifts. A convenient and easy way to organize your charitable intentions is to create a donor advised fund. Consider it one-stop giving.

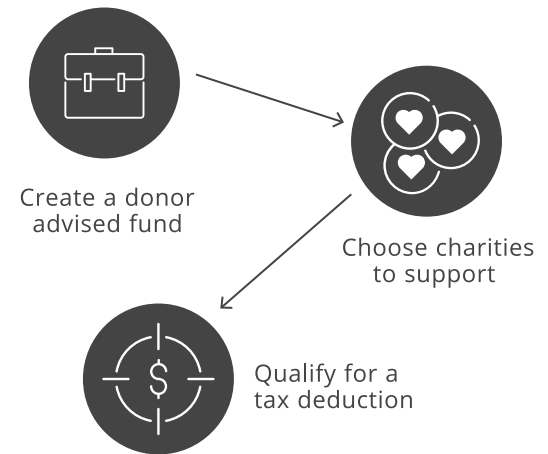
A donor advised fund (DAF) gives you the flexibility to recommend how much and how often money is granted to USA for UNHCR and other charities. You transfer cash or other assets to a community foundation, financial services firm or other sponsoring organization. You can then recommend — but not direct — how much and how often money is granted.

Setting up a DAF qualifies you for a federal income tax charitable deduction when you make a gift to the fund — without immediately having to choose the charities you want to support. If you so choose, you can support a number of charitable organizations without having to retain records for a number of separate contributions.

# Donor Advised Funds

## How It Works

1. You open a DAF by written agreement with a community foundation, financial services firm or other sponsoring organization. Most DAFs require a minimum gift to open your fund, although additional contributions may be less.
2. You name your loved ones as your successor to continue to recommend grants to charitable organizations, or you can name us as a beneficiary to receive all or part of your account after your lifetime.
3. You may make contributions to your fund at any time. Your contributions are invested by the sponsoring organization, which provides a regular accounting to you.
4. You qualify for a federal income tax charitable deduction for each gift to your donor advised fund.
5. You make recommendations that various amounts be distributed to charitable organizations of your choice, such as USA for UNHCR. However by law, you cannot direct distributions.



## Advantages

Donors enjoy a certain level of privacy, having the option to keep donations anonymous. These funds are flexible — you can add to the fund at any time, and you don't need to have a specific purpose for each gift. And again, the funds offer the simplicity of keeping a multitude of philanthropic activities organized in one stream of documentation and finances.

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### **Additional Considerations**

#### **Where to find donor advised funds.**

Begin with your local community foundation and nonprofit organizations. Financial services firms also offer a growing number of national donor advised funds.

#### **Evaluate the sponsoring organization carefully.**

When you make a gift to a donor advised fund you irrevocably give away your money or property. Make sure the organization you select is one that supports your values.

#### **Understand the fund's policies and procedures.**

Minimum contributions, as well as the amount and frequency of grant recommendations, all vary depending upon the sponsoring organization.

#### **Consider costs and investment results.**

All donor advised funds charge administrative fees that

can vary considerably. In addition, investment performance will vary from one donor advised fund to the next, affecting the amount that will actually be distributable to a charitable organization.

#### **Disadvantages**

Because these funds are managed, they have administrative fees. There are also minimums for establishing a fund, with possible minimums for future donations. You also retain less control than other gift vehicles, as donations are irrevocable. And you can only recommend distributions to the managing organization, you cannot direct them.

## Donor Advised Funds

### Next Steps

Turn your DAF into a lasting legacy at USA for UNHCR by naming us as a full or partial beneficiary when you create the fund, or contact your fund administrator to complete a change form. For detailed information, please contact us.

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