Unlock the Benefits of Your

Donor Advised Fund



Optimize Your Giving Strategy

UNITED METHODIST MEN FOUNDATION

LEGACY GIVING FOR POSITIVE CHANGE

Have you considered using your **donor advised fund (DAF)** to support the causes that matter most to you? Did you know you have the ability to support multiple charities when you make a single significant gift to your DAF? Do you want to support our mission today?

If you answered yes to any of these questions, you should consider using your donor advised fund to make a charitable grant to support our organization.

How can a DAF Benefit You?

Deductibility. You may be entitled to take an immediate income tax deduction each time you give a gift to your DAF. Contributions of appreciated capital assets avoid capital gains taxes.

Impact. You can give from set-aside funds at any time, without a new out-of-pocket expense. You can put your generosity into action by making a distribution from your DAF.

Simplicity. A DAF is easy to set up and helps you avoid the extensive bookkeeping and check-writing that is often involved in charitable giving.

Versatility. You can make gifts to your DAF using cash, appreciated securities and a variety of other assets.

Multiplicity. You can make a gift of one large asset to fund multiple charitable interests.

Privacy. You can designate your grants anonymously if you wish.

Family. You can engage your family in the journey and joy of generosity.

Legacy. You can ensure that your legacy continues by leaving instructions with your heirs directing them to give. Giving from your DAF through your estate can also simplify your charitable estate bequests.

How does a Donor Advised Fund Work?

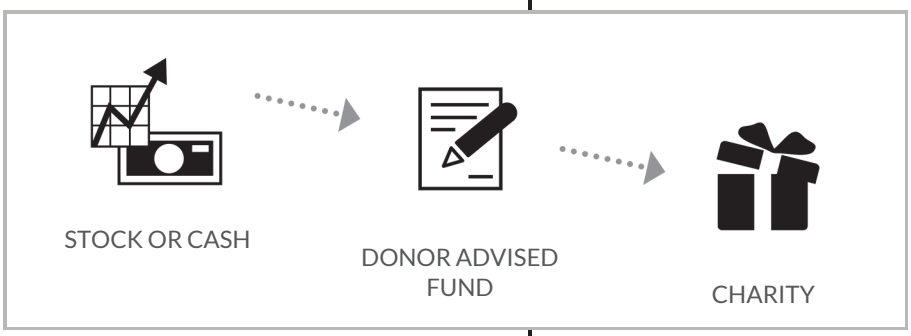
A DAF is your own charitable fund, named after you and administered by a charitable organization. You can make contributions to your fund, which will be invested to benefit the causes you care about. Once your fund is created, you can advise the DAF custodian to make grants from your fund to support the work of your favorite charitable causes.

How Do You Give From a Donor Advised Fund?

A donor advised fund is easy to create with a few simple steps.

1. Please contact your DAF custodian for the steps to recommend a charitable distribution. You may be able to direct a gift online.

2. Make grant recommendations from your DAF as often as you like.



The assets in your DAF grow tax free and earn interest. When you pass away, your heirs continue to recommend charitable grants from your DAF.

The Advantages of a DAF

A donor advised fund has several advantages when compared to a private foundation. The start-up time and costs are minimal for DAFs, and gifts to DAFs are generally deductible at fair market value. In addition, a DAF is not subject to the distribution requirements and certain excise taxes faced by private foundations.

Definitions

Donor Advised Fund (DAF)

A way for a donor to support charitable causes over time. The fund is established with a nonprofit organization and, after a donor contributes to the fund, the donor can make charitable gifts directly from the fund each year. The donor is entitled to take a charitable deduction in the year contributions are made to the DAF. Charitable distributions from the DAF to other nonprofits do not create a deduction.

Charitable Income Tax Deduction

An individual who makes a gift to a qualified charity may take this deduction, if they itemize their deductions when filing their income tax return. These deductions are subject to certain limits each year and are usually based on the fair market value of the property donated to charity.



We Can Help!

We would be pleased to work with you and your DAF. Please let us know if you wish to recommend a grant from your donor advised fund. If you would like help to start the process or have any questions, please contact us.

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