

Summary for Donors

Why AEF for a donor-advised fund?

AEF offers flexibility to donors in what they gift and to which charitable organizations they recommend grants.

Let's make an impact together.

Donate



AEF is a 501(c)(3) public charity. You receive a **tax benefit** when you donate to AEF. Donor-advised funds can **accept everything from cash and publicly traded securities to more sophisticated illiquid and alternative assets.**

Donors receive a charitable gift acknowledgement when they contribute a gift to their AEF donor-advised fund account.

Invest



AEF partners with firms and financial advisors in an **unbiased** manner to expand philanthropic giving through donor-advised funds. You can think of a donor-advised fund as a **charitable account.**

Gifted assets are managed by AEF-approved financial advisors recommended by AEF donors. This enables donors to **create a significant charitable impact.**

Grant



AEF is an **unbiased** administrator and **does not prohibit** grants based on geographic, religious, or other categories. AEF's donors can recommend grants to IRS-qualified public charities. Donors can choose to give to the causes and charities they care deeply about.

AEF allows successor donor advisors to be named, allowing your charitable legacy to live on generationally.

WHY USE A DONOR-ADVISED FUND?

With a donor-advised fund, donors can:

- Quickly and easily set up a donor-advised fund with no setup charges
- Avoid the complexity and expense of more complicated giving vehicles
- Donors achieve immediate charitable goals and receive highest available tax benefits
- Simplify charitable giving and record keeping
- Assets grow tax free
- Initiate legacy conversations
- Engage the next generation in philanthropic conversations
- Fund future giving

TYPICAL CLIENT SCENARIOS

An AEF Donor-Advised Fund can be a solution for donors who:

- Experience a **high-income** year and want to set aside assets now to fund future giving.
- Want to **minimize taxes**, especially when selling highly appreciated asset(s).
- Prefer **flexibility** to change their charitable **beneficiaries** over time.
- Want to engage family members in charitable giving as a way to pass on **family values.**
- Want to manage and track giving in a **simple and organized** way. One annual tax receipt.
- Have favorite charity(ies) **that cannot accept non-cash donations.**
- Want to be able to give **anonymously** to certain charities.
- Needs **time to decide** which charities to support.
- Are concerned about the **cost and complexity** of a **private foundation.**