

The AEF Difference

AEF expands philanthropy by partnering with firms and advisors in the financial services industry. This enables more donors to create a significant charitable impact.

What makes us unique? AEF partners with firms and financial advisors in an **unbiased manner to expand philanthropic giving through donor-advised funds**. We work with donors through their financial advisors to establish and administer AEF donor-advised fund accounts to increase the amount granted to our donors' causes and charities.

This approach affords us the ability to be laser-focused on what we do best: deliver a best-in-class client experience.

WHY AEF FOR A DONOR-ADVISED FUND?

- 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 to an AEF donor-advised fund account.
- Invest** AEF partners with firms and 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 invested 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
- Achieve immediate charitable goals and in most cases receive highest available tax benefits
- Simplify charitable giving and record keeping
- Grow most assets tax free
- Initiate legacy conversations
- Engage the next generation in philanthropic conversations
- Fund future giving

ABOUT AEF

Established in 1993, American Endowment Foundation (AEF) is one of the nation's largest independent donor-advised fund sponsors. AEF is a mission-motivated organization focused on expanding philanthropy led by a people-driven culture that results in a best-in-class client experience.

Global Impact

From your local community to your alma mater to everything in between, we support donors' favorite causes and charities.

NEARLY
\$5B
SINCE INCEPTION

\$1.2B
GRANTED IN 2023

\$4.9M
GRANTED EACH
BUSINESS
DAY IN 2023

NEARLY
32K
UNIQUE
CHARITIES

LET'S MAKE AN
IMPACT TOGETHER.

Expanding Philanthropy

AEF BY THE NUMBERS (AS OF DEC. 31, 2023)



NEARLY
\$7B
IN ASSETS

One of the nation's largest independent donor-advised fund sponsors.



\$10.8B
IN DONATIONS
SINCE INCEPTION

Delivering best-in-class service and flexibility for your charitable giving.



14K
DONOR-ADVISED
FUNDS

The most popular and fastest-growing charitable giving vehicle in the country.

Financial Advisor Centric

A people-driven culture that results in a best-in-class client experience for firms and financial advisors.









NEARLY
6K
FINANCIAL
ADVISOR
PARTNERS



OVER
2.5K
PARTNERSHIP
FIRMS

Areas of Impact

-  Education
-  Religion
-  Community
-  Health
-  Environment
-  Other

