

# Summary for Financial Advisors

## 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 clients who:

- Have **charitable intent** and have been or will be active donors.
- Want their advisor to have added **flexibility** in managing their philanthropic assets.
- Need **charitable deduction** now and wants to set aside money for **future gifting** allowing time to decide which charities to support.
- Want to manage and track their giving in a **simple** and more **organized** way.
- Desire or already have a **private foundation** but do not like its complexity or cost.
- Want to be able to **give anonymously** to certain charities.
- Plan to **sell a business** or anticipate a liquidity event.
- Strive to **minimize taxes** and receive the biggest deduction when selling assets.
- Want to **engage family members** in charitable giving to pass on family values.
- Want to donate to charities throughout their lifetime or in **perpetuity.**