



## Why American Endowment Foundation (AEF)?

**Advisors can custody and manage assets** on any platform at any asset level. They have unparalleled flexibility in selecting clients' DAF investments.

**Flexibility** in accepting a variety of simple or complex assets including cash, publicly traded securities, closely held stock, real estate, life insurance policies and more.

**Giving timetable** can be during lifetime or in perpetuity.

**Preferred DAF** of numerous independent broker dealers, RIAs, banks and custodian/clearing firms.

**Donors can recommend** grants to charities throughout the US and overseas.

**Establishing a DAF can be simple**, quick, and at no cost.

**Personalized service** as advisors and donors work with designated AEF staff.

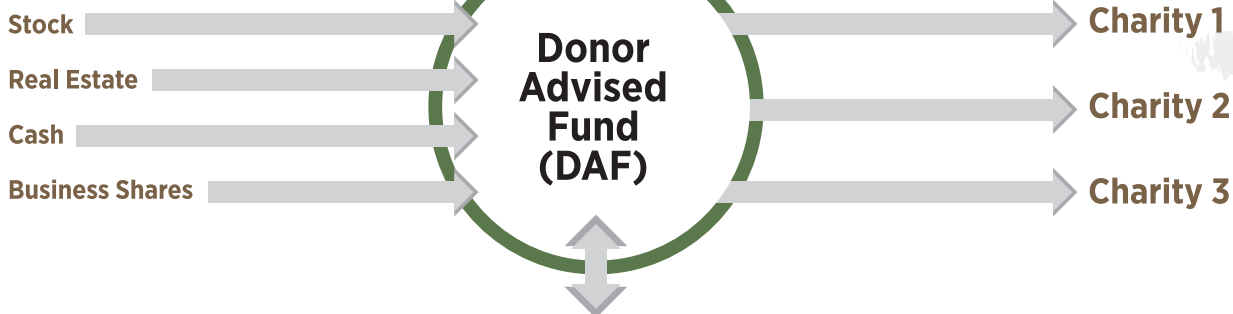
**Competitive pricing**, no hidden fees or lengthy contracts.

## Typical Client Scenarios

An AEF DAF 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.
- Have high income and want to set aside money for future gifting when income is less.
- Are approaching retirement, or who want to establish a fund while young.
- 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.
- Need charitable deduction now but needs time to decide which charities to support.
- Plan to sell a business or anticipate a liquidity event.
- May want to sell assets such as real estate, farmland, or collectibles.
- Cannot easily determine cost basis of assets that they or advisor want to sell.
- Strive to minimize taxes and receive biggest deduction when selling assets.
- Have fluctuating income that makes it difficult to maintain a steady level of giving.
- Want to engage family members in charitable giving to pass on family values.
- Want to donate to charities throughout their lifetime or in perpetuity.
- Question how best to support several charities through sale of one asset.

## Charitable Giving (Donor)



Managed by Trusted Advisor

Continued education through AEF's thought leadership articles can be found on our website.

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