



## Why American Endowment Foundation (AEF)?

**Assets can be managed** at any amount by donor's financial advisor.

**Unparalleled flexibility** for donor's advisor to select 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.

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

**Personalized concierge service.**

Donors are assigned a dedicated grants administrator.

**Reasonable fees;** much lower expense than many other DAF programs or private foundations.

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

**Donors decide** when and how they want to make charitable grants. Can be scheduled in advance.

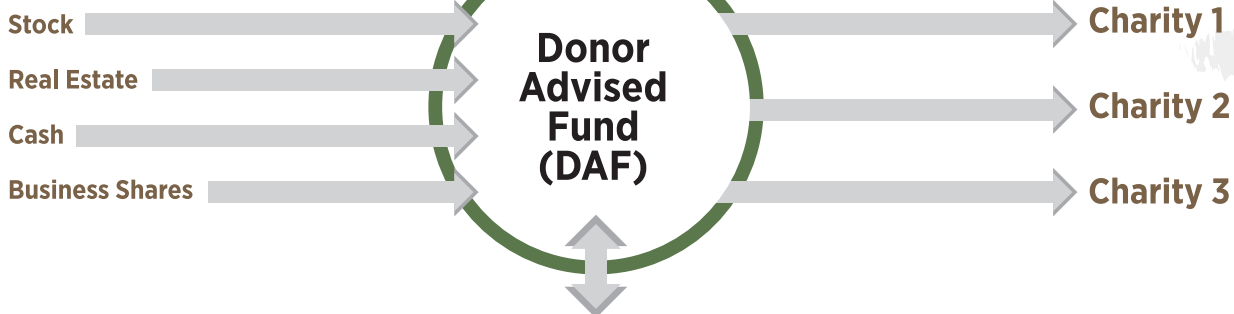
**Donors can distribute** final grants at death or appoint successor advisors in perpetuity.

## Typical Donor Scenarios

An AEF DAF can be a solution for donors who:

- Experience a high income year and want to set aside assets now to fund future giving.
- Are approaching retirement, or want to establish a fund while younger and in peak earning years.
- Want to minimize taxes, especially when selling highly appreciated asset(s).
- Question how best to support several charities over a number of years through one gift.
- 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.
- Are concerned about the time and complexity in gifting appreciated assets to more than one charity.
- 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.
- Plan to sell a business or other asset or anticipate inheritance.
- Needs time to decide which charities to support.
- Have fluctuating income that makes it hard to maintain a steady level of giving.
- Are concerned about the cost & complexity of a private foundation.
- Understand that a large gift might overwhelm their favorite charity.

## Charitable Giving (Donor)



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

For more information, please give us a call or visit our website: **1-888-440-4233** • **[www.aefonline.org](http://www.aefonline.org)**