



American Endowment Foundation

Top Ten Questions: When to Consider an AEF Donor Advised Fund

Financial advisors who know what to look for can uncover significant opportunities, increase assets under management, and benefit their prospects and clients in ways that are tax-efficient and can be easy to implement.

The 10 questions to ask clients/prospects are:

1. Do they own low-basis, illiquid assets such as real estate, art, commodities, or collectibles?
2. Do they plan to sell a business or privately-held stock (but are not yet under contract)?
3. Do they want their philanthropic assets professionally managed by their current advisor?
4. Do they have a high annual income and want the highest allowable deduction?
5. Do they like the idea of a private foundation but don't like the complexity of administration or expense?
6. Do they want complete anonymity when they donate to charity?
7. Do they have a need for a charitable write-off now, but want to take their time in deciding to which charities and how much they want to donate?
8. Do they want to engage their heirs and pass on family charitable values in perpetuity?
9. Do they want to manage their charitable giving in a more organized way?
10. In addition to making cash grants to charities, do they want to make loans and equity investments to their favorite charitable causes?

If a client answers "YES" to one or more of these, then a donor advised fund (DAF) may be an ideal financial vehicle. At American Endowment Foundation (AEF), our DAFs offer **5 attributes** that set them apart from numerous other administrators of donor advised funds:

1. We allow our clients' financial advisors to manage and custody charitable assets – at any dollar level.
2. We can accept and maintain complex assets within your DAF.
3. We allow in perpetuity appointments of successors. This allows donors' heirs to continue their intended charitable legacy.
4. We provide concierge service. From gifts to grants, we offer personalized service and advisement in ways unachievable by many other DAF administrators.
5. We offer [program related investments](#). Donors can recycle their funds in innovative ways for greater charitable good.