

What Makes American Endowment Foundation (AEF) Unique



Independence

Most donor advised fund programs (DAF) are affiliated with a financial services company or a public charity. AEF is truly independent and does not provide financial advice, sell financial products, offer custody services, and is cause-neutral. AEF is thus able to work with nearly all donors and their preferred financial advisors and custodians.



Open Investment Architecture

Most DAF sponsors restrict investment choices to a limited menu of proprietary mutual funds or endowment pools. AEF does not comingle investments which allows our donors' financial advisors to select and manage the assets. AEF DAF assets are segregated and can include a wide variety of stocks, bonds, mutual funds, ETFs and third party managers within the separately managed portfolios.

Designed for Donors Who Depend Upon Their Trusted Advisor

AEF is designed for donors who are typically familiar with a more tailored approach to investments. At American Endowment Foundation, donors may recommend their investment manager to manage the investments in separately managed accounts. The primary appeal of separately managed accounts lies in the investment manager's ability to tailor the asset allocation and the selection of securities.

Contribution Flexibility

Many DAF sponsors only accept donations of cash and marketable securities. AEF also accepts gifts of closely-held stock, LP and LLC interests, life insurance, real estate, cryptocurrencies, etc.

Liquidation Flexibility

Most DAF sponsors require immediate liquidation of contributed assets. AEF can hold assets in-kind.

Succession

Many DAF sponsors limit succession to the life of the donor and spouse and/or to their children. AEF allows the fund to continue in perpetuity if desired.

Grant Making Flexibility

Many DAF sponsors limit grants to their geographic area or to specific causes or charities, while others require a large percentage of the grants to be made to the DAF sponsor itself during lifetime and at the donor's death. AEF donors are able to support all US-based charities that are in good standing under the Internal Revenue Code, as well as to international charities.

History and Size

AEF was founded in 1993 and is the country's largest independent donor advised fund.