

WHAT IS A DONOR ADVISED FUND?

United Way offers Donor Advised Fund accounts (DAFs) to help you distribute your philanthropic dollars throughout the year.

A DAF is an account where an individual can make a charitable gift while enjoying an immediate tax benefit and retaining advisory privileges to distribute charitable gifts over time.

DAFs are the fastest-growing charitable giving vehicle in the United States because they are one of the easiest and most tax-advantageous ways to give to charity. Once you establish your fund, you can continue to add to it anytime, receiving tax benefits with each new gift.

When your account is created, you can name United Way of the Greater Triangle as the beneficiary of the fund. Any remaining funds will be transferred to the Centennial Fund.

BENEFITS

- Great customer service from knowledgeable staff.
- Contribute immediately, build a philanthropic strategy, and donate when you're ready.
- Can accept non-cash assets, such as stocks, mutual funds, and bonds, as well as complex assets, such as private S- and C-corporation stock.
- Guarantee philanthropic dollars reach the causes you care about with an irrevocable contribution.
- Easy to open and simple to use.
- Flexibility for thoughtful giving, both short- and longterm.
- Create a charitable legacy.
- Choose how you are acknowledged.

START YOUR FUND WITH \$2,500 How does it work?

1.



DONORS CONTRIBUTE

cash, stocks, or bonds to their personal Donor Advised Fund.

2.



IMMEDIATE TAX BREAK

Receive a tax break as soon as contribution is made and maximize your tax benefits.

3.



SUPPORT YOUR UNITED WAY & OTHERS

Start gifting to United Way and other charities you care about. Make donations to multiple charities from one place.

If you would like more information or are ready to setup your own DAF, please contact Kelsey Camarena, Chief Philanthropy Officer at kcamarena@unitedwaytriangle.org