



, The Epsilon Educational Endowment | 2746 Beechwood Dr SE, Grand Rapids, MI 49506
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Gifts Through a Donor Advised Fund

If you have a Donor Advised Fund, or an advisor suggests an opportunity for a Donor Advised Fund for future use, the benefits. They are far easier to establish than a private foundation and allow you to take a tax deduction now and support charities including The Epsilon Educational Endowment with relatively small amounts of money.

How does it work?

When you open a donor advised funds (DAF), you are creating a separate entity with the sole purpose of using the assets undermanagement to support qualified charities.

Talk to your financial advisor, contact your local community foundation, or set up at donor advised fund at www.fidelitycharitable.org (<http://www.fidelitycharitable.org/>), www.schwabcharitable.org (<http://www.schwabcharitable.org/>), or www.vanguardcharitable.org (<http://www.vanguardcharitable.org/>).

You can fund the DAF by irrevocably contributing assets such as cash, appreciated stock, insurance proceeds, or various other forms of capital. Given that your DAF is a separate entity, you can take an immediate tax deduction for your contribution without having to make immediate grants to specific charities.

As advisor to the fund, you can elect to manage the investments personally or choose to have an investment advisor manage the portfolio.

The two primary avenues of supporting the **The Epsilon Educational Endowment** with your donor advised fund are through recommending grants and a beneficiary designation.

Grants

While you or your assigned successor(s) are advising the fund, you can recommend grants from the fund to support the **The Epsilon Educational Endowment**, and other charitable organizations.

Beneficiary

By assigning the **The Epsilon Educational Endowment**, you are ensuring that when the DAF ceases to have an advisor the assets in the account get transferred to the The Epsilon Educational Endowment.

What are the Benefits?

- Receive an immediate deduction on your taxes.
- Assets in the fund grow tax free.
- Easier, and less expensive than establishing a private foundation.
- Allows you to get started with a relatively small amount of money, as low as a \$500 gift.
- Tax smart for those using a "lumping" strategy under the new tax laws.

With a low barrier to entry and multiple ways to create charitable impact, DAFs are a great strategy for charitable giving. If you have questions about setting one up, or want more information please contact The Epsilon Educational Endowment.

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