



# A Smarter, Easier Way to Give



## Streamline your giving with a Donor-Advised Fund

**No more manual tracking.** Managing your charitable giving should be simple. Instead of keeping track of multiple receipts, imagine having just one record for tax time—clear, organized, and hassle-free.

A **Donor-Advised Fund (DAF)** streamlines your giving by consolidating all your charitable contributions into a single account automatically. With one place to manage donations and one receipt for tax purposes, you can focus on what matters most—supporting the causes you care about.

## Why Choose a DAF?



### Impact with Simplicity

No more tracking multiple donations and receipts, tax season is about to get easier. A DAF consolidates everything into a single, easy-to-manage fund.



### Flexibility and Control

You'll receive a tax deduction in the year you contribute to a Donor-Advised Fund, with no deadline for distributing funds, even beyond your lifetime.



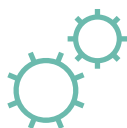
### Effortless Giving with Maximum Results

Support multiple charities in just a few clicks, with fast and reliable grants—no more waiting for checks to clear.



### Better for Charities

Charities receive funds quickly via **ACH**, helping them get resources where they're needed most.



### Set It and Forget It

Schedule grants in advance or automate recurring donations to your favorite causes.



### When You're Ready

Donate now, grant later—give when it feels right without rushing year-end decisions.

## Who Should Consider a DAF?

A Donor-Advised Fund is ideal if you:

- Give to multiple charities each year and want an **easier and streamlined way to manage donations**.
- Want to make a lasting impact on the causes you care about—**without the hassle** of administrative tasks.
- Prefer a **centralized giving account**, making it **effortless** to track and manage all your gifts in one place.
- Want to ensure **charities receive funds faster and more efficiently**.

## How It Works

1

**Contribute** cash, stock, or other assets to your DAF.

2

**Decide when and where to give**—instantly or over time.

3

**We handle the rest**—from sending grants to keeping records organized.

# Donor-Advised Funds are More Popular than Ever

More people are choosing DAFs as their preferred way to give, making charitable donations easier and more strategic.



## 1.78 million

DAF accounts in the U.S.

## \$251.52 billion

in assets held in DAFs

## \$52.16 billion

granted to charities in 2023

Source: National Philanthropic Trust 2024 DAF Report

## Make a Difference Without the Paperwork

By joining the growing number of donors using a DAF, you can simplify the entire giving process. Continue supporting the causes you love without the complexity or the stress.

*One Account, One Record, Effortless Giving*