



INFAITH INSIGHTS

August 2017

Clients Use Donor Advised Funds to Give, Grow, Grant

There's a reason donor advised funds are one of the fastest-growing charitable vehicles in the industry today. In fact, there are several reasons. They're flexible, accessible and tax deductible.

Think of a donor advised fund as a charitable bank account from which clients can make gifts to the churches and nonprofit organizations they select, when the time is right for them – either during their lifetime or to fulfill their legacy.

Wealth advisor Michelle Clary says, "When the concept of donor advised funds is explained to charitably-minded clients who want to minimize taxes, it's an easy conversation." [Read Michelle's perspective](#) on identifying which clients are ready for this conversation and why she relies on InFaith Community Foundation to help them accomplish their objectives.

GIVE NOW.

Make an immediate, outright gift of cash, stock or real estate*.

GIVE LATER.

Maintain flexibility and control of assets while living and support charities upon death. Options include life insurance, living trusts, bequests and beneficiary proceeds.

GIVE & RECEIVE.

Convert gift assets into quarterly income payments through a charitable gift annuity or remainder trust.

GROW

Donor gifts are carefully invested for growth and maximum sustained support to charities.

*Clients 70 ½ or older can create a non-advised fund with gifts of qualified charitable distributions from an IRA. Contact InFaith for more information.

GRANT.

Donor's Charities & Causes

Donor Advised Funds

- Advise grants to any charity at any time; or
- Designate charities to receive annual grants for a term of years or in perpetuity.

Scholarship Funds

Field of Interest Funds

Collaborative Funds

Organizational Endowment Funds

How Donor Advised Funds Work

In consultation with you, our gift planners can help your clients determine the timing and solution that's right for them. We offer [flexible fund options](#) that clients can use to provide immediate or long-term charitable support.

Why Choose InFaith

FRs often share these key reasons they trust clients' charitable planning with us:

- **Collaboration.** You remain your client's primary contact while our gift planners and donor services professionals are available for ongoing consultation.
- **Accessibility.** What makes our donor advised funds unique is that there is no required minimum to establish a fund at InFaith, and donors can grant as little as \$200.
- **Sound investments.** InFaith donor advised funds are invested for growth with advisement by industry leader Cambridge Associates. [Learn more.](#)

Call our gift planners for more information or to discuss specific cases at 800-365-4172.

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, gifts are tailored to each donor's charitable interests and financial circumstances. InFaith Community Foundation is a proven steward of these gifts, earning consistently high ratings from Charitable Navigator for sound fiscal management and GuideStar for transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities.

[inFaithFound.org](#) | p 800-365-4172 | 625 Fourth Avenue South Suite 1500, Minneapolis, Minnesota 55415

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RESOURCES

[Contact a Gift Planner](#)

[inFaithFound.org](#)

[FR Resources Webpage](#)

Follow InFaith Community Foundation on [Facebook](#) and [Twitter](#).

Did you miss our June 8 webinar? The recording is on [our website](#),

"Charitable Planning in Your Practice."

Get to know your [InFaith Gift Planners](#)