



WHAT IS A Donor-Advised Fund?

A donor-advised fund, or DAF, is a popular tool for charitable giving because it multiplies gift impact, maximizes tax benefits and simplifies the giving process.

Think of a DAF like a savings or investment account for all of your charitable giving. Instead of writing multiple checks to individual charities,

you contribute to your DAF account and receive an immediate tax deduction.

Those contributions are invested and grow tax-free. You decide which charities to support and how often. When you're ready to make a gift from your DAF, WatersEdge sends the check to your chosen charity.

HOW IT WORKS



4 THINGS TO KNOW ABOUT

Donor-Advised Funds

1 Enjoy Ultra-Flexibility
Contribute cash, stocks, property or other assets at your convenience. Make gifts as often as you like.

2 Reap Tax Advantages
Contributions are immediately tax-deductible. You'll pay no capital gains tax on donations of appreciated assets, including stocks and real estate.

3 Simplify Your Giving
Contributions are invested and grow over time to maximize charitable impact. All growth is tax-free.

4 Reduce Fees With WatersEdge
There are no fees to open an account or process gift requests. Management fees are waived for select investments.

GIVING EXAMPLE

The Robinsons started a DAF with WatersEdge using \$10,000 in stocks, \$4,000 in private equity and \$1,000 in cash, and received an immediate tax deduction. The money was invested and earned an additional \$250 while the Robinsons decided which ministries they wanted to support. When they were ready, the Robinsons gave grants from their DAF to their church, the IMB and disaster relief. WatersEdge sent all the checks and, at the end of the year, sent the Robinsons a summary of their DAF giving.



GET STARTED AT:

WatersEdgeServices.org/DAF