



American Heart Association®

Donor Advised Fund

American Heart Association Donor Advised Fund Program

The act of philanthropy means different things to different people, and chances are, your strategy will change over time. As your assets increase, you may have a greater need to incorporate a gifting strategy into your overall financial plan. Today, there are a variety of charitable vehicles available to help fulfill your philanthropic goals while also maximizing your gift, controlling the timing of tax deductions, and helping you prepare to leave a legacy. The American Heart Association Donor Advised Fund Program provides a flexible solution to support your ongoing charitable goals and complement your overall financial plan.

What is a donor advised fund?

A donor advised fund is a charitable vehicle administered by a public charity for the purpose of managing donations on behalf of an individual, family, or organization. Compared to giving directly to a specific charitable organization, a donor advised fund offers you more flexibility over your gifted assets. You can recommend distributions to one or more charitable organizations on your personal timetable.

What is the American Heart Association Donor Advised Fund Program?

The American Heart Association Donor Advised Fund Program is a program sponsored and managed by the Renaissance Charitable Foundation Inc. — a qualified tax-exempt public charity — to help facilitate your philanthropy over time. Your contributions to the American Heart Association Donor Advised Fund Program are credited to a charitable gift account from which you may recommend grant distributions to any qualified tax-exempt charitable organization. While your recommendations are subject to review and approval by the sponsoring charity, grants to eligible organizations will typically be based on your recommendations.

Enjoy flexibility, convenience and savings

A donor advised fund can be easier and more cost effective to establish and maintain than a private foundation. Because your fund is sponsored by a public charity, when you make a contribution, you may receive the more beneficial “public charity” tax deduction for your donation. In addition, you may avoid excise taxes and other restrictions imposed on private foundations. You can also enjoy the convenience and resources of the sponsoring public charity in support of your philanthropy without incurring the staffing and legal fees associated with a private foundation.

How the fund works

Contributions to your fund can be made at your convenience and they can be in the form of cash, as well as other non-liquid assets including mutual funds, stocks and bonds. In certain conditions, you may also be able to donate real estate and other specialty assets. Your contributions result in a charitable income tax deduction, which in many cases, may be used to reduce your overall tax liability.

You can recommend grants to qualified charitable organizations from your fund at any time and have the choice of giving anonymously or receiving recognition for your generosity. You can further customize your giving by setting up recurring grant recommendations to your favorite organizations on a personalized schedule.

Simplify your ongoing giving

The American Heart Association Donor Advised Fund Program is fully accessible and manageable online. You'll be able to:

- View your account balances
- Manage contributions
- Research charitable organizations
- Recommend grants
- View investment pool performance
- View your quarterly statement
- Access and track your contribution and grant history
- Update donor information



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Program **FACT SHEET**

Leave a philanthropic legacy

With your American Heart Association Donor Advised Fund Program account you have the opportunity to engage your children, grandchildren or other individuals in your own philanthropic vision as co-advisors or successor advisors. You can use your fund to coach succeeding generations in the art and practice of giving, and provide the experience of managing assets for strategic purposes. Your fund can also be an effective tool to help pass important personal and family values on to successor advisors, thereby creating and sustaining a strong philanthropic legacy with future generations and within the communities you love.

Your fund can be combined with other charitable, estate, and financial planning tools to maximize the impact of your assets for accomplishing your short and long-term goals and objectives.

Available investment pools

When you recommend how your fund assets are managed, you can select from one of the investment pools which include socially responsible investing (SRI) options. Each of these pools has a different investment objective and your financial advisor can help you determine which is the most appropriate for your overall philanthropic plan and distribution requirements.

Getting started

Setting up your fund. Your financial advisor or association representative can help you complete the fund account application to create your American Heart Association Donor Advised Fund Program account and make your first contribution. You can identify up to two donors, name your fund and designate successor advisors.

Selecting your recommended investment strategy. Next, you can recommend how initial and future contributions to your fund will be invested, resulting in the potential to grow the assets, build the account over time, and ultimately provide a greater impact to the organizations you support.

Contact us

Contact your association representative to discuss your options.

American Heart Association Donor Advised Fund Program

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The American Heart Association Donor Advised Fund Program

The American Heart Association Donor Advised Fund Program is a program sponsored by the Renaissance Charitable Foundation Inc. This donor advised fund program is made available through American Heart Association Donor Advised Fund, which provides products and services through UBS Financial and its various affiliates and subsidiaries. As required by law, all contributions to a UBS Financial Gift Account are under the exclusive legal control of the Renaissance Charitable Foundation Inc. Neither UBS Financial and its affiliates nor the Renaissance Charitable Foundation Inc. provide tax or legal advice. Please consult your legal advisors to determine how this information may apply to your own situation. Whether any planned tax result is realized by you depends on the specific facts of your situation at the time your taxes are prepared.