



American Heart Association®

Donor Advised Fund

Why a Donor Advised Fund?

What is a DAF?

A Donor Advised Fund (DAF) is a charitable giving vehicle that allows donors to contribute as frequently as they like and then recommend grants to their favorite charities from their personal fund. The fund is established through a public charity, like the American Heart Association so donors can receive an immediate tax benefit on their contributions and avoid the capital gains tax on appreciated assets.

Is a DAF right for me?

Do you want to...

- Simplify your charitable giving
- Support multiple worthy charities in addition to the American Heart Association
- Work with your trusted investment advisor to manage the assets in your DAF
- Give anonymously

What are the Benefits?

- Leave a legacy
- Immediate income tax charitable deduction
- Organize your philanthropy
- Pass on your personal charitable assets
- Avoid capital gains
- Build an endowment
- Recommend anonymous grants

What is the American Heart Association Donor Advised Fund?

The American Heart Association Donor Advised Fund program is sponsored by Renaissance Charitable Foundation (RCF). It offers increased flexibility for your charitable contributions, and allows you to instill your value of philanthropy in your family for generations.

How do I get started?

- 1 Complete the donor application with your financial advisor
- 2 Create a name for your fund to include your family name, or a title that embodies your philanthropic legacy
- 3 Make an initial contribution of cash or appreciated assets (Minimum contributions start at \$25,000)
- 4 Work with your financial advisor to make recommendations on how your fund is invested
- 5 Recommend grant distributions through your online giving account

What are my options?

Contact an American Heart Association representative to learn more about a donor advised fund!

www.heart.org/plannedgiving
(800) 584-8946

What Assets can I contribute?

Cash
Stocks
Mutual Funds

Real Estate
Closely-held
Business Interests
IRAs

Bequests
Trust Interests
Life Insurance