

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 so donors can receive an immediate tax benefit on their contributions and avoid the capital gains tax on appreciated assets.

Who is Commonwealth Charitable Fund?

The Commonwealth Charitable Fund is a DAF that offers increased flexibility for your charitable contributions and allows you to instill the idea of philanthropy in your family for generations to come. It is offered through Renaissance Charitable Foundation.

Is a DAF right for me?

It is if you want to . . .

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

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 reflects your philanthropic preference.
3. Make an initial contribution of cash or appreciated assets.
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 the benefits?

- Leave a legacy
- Take immediate income tax charitable deduction
- Organize your philanthropy
- Pass on your advisory rights in your DAF
- Avoid capital gains
- Build an endowment
- Recommend anonymous grants

What are my options?

Please call our team to learn more about the different options available to you.

What assets can I contribute?

- Cash
- Stocks
- Mutual funds
- Real estate
- Closely held businesses
- IRAs
- Bequests
- Trust interests
- Life insurance

The Commonwealth Charitable Fund is offered through Renaissance Charitable Foundation.

Visit <https://cfndaf.donorfirstx.com> or call 888.487.8490 to learn more.