

# Is A Donor-Advised Fund Right For You?

The Answer May Be Yes If You

1

## Want Maximum Flexibility

Want maximum flexibility to give to a variety of nonprofits over time, and the convenience of a single tax receipt.



2

## Wish to Involve Your Family

Wish to involve your spouse, children, or grandchildren in your philanthropy.



3

## Prefer the Option of Anonymity

Prefer the option to be anonymous with some, or all, of your giving.



4

## Had an Exceptionally High-Income Year

Had an exceptionally high-income year in which you need immediate charitable tax benefits, but you prefer to decide which nonprofits to support over time.



5

## Wish to Simplify Your Giving

Would like someone else to handle the administrative work while you focus on your charitable impact.



## How a Donor-Advised Fund Works

### Give

to your fund and receive a tax deduction



### Grow

your charitable assets today and tomorrow



### Grant

to the causes you care about most



Contact your advisor to learn if a Donor-Advised Fund is right for you. Or, for more information contact Sam Leask, Philanthropic Services Director at (831) 662-2060 or [sleask@cfsc.org](mailto:sleask@cfsc.org).