



**Desert Southwest**  
UNITED METHODIST  
FOUNDATION

Anne Green, Executive Director  
Judi Smith, Gift Planning Officer  
1300 S. Litchfield Road, Suite 110-B  
Goodyear, AZ 85338  
agreen@dsumf.org  
jsmith@dsumf.org

## THE GIFT THAT KEEPS ON GIVING



How would you like to make a gift today that would enable you and your loved ones to continue to make charitable gifts in the future? When you make a gift to our organization of cash or other assets, we take your tax deductible contribution and establish a special account in your name. Your account is then invested to grow over time, permitting you to recommend annual gifts to your favorite charities.



This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

Copyright © 2020 Crescendo Interactive, Inc. Used by permission.

OS-2011-50.5-th

DONOR ADVISED FUND

# GIVING FOR THE FUTURE

## AN INVESTMENT FOR THE FUTURE

A Donor Advised Fund is like having your own foundation. The fund is invested for growth, which permits you to make annual gifts of income and principal while you are alive. When you pass away, your children may make recommendations for distributions from the fund for a number of years. If you establish a Donor Advised Fund with us, at the end of the term, you will have a few options for your remaining fund balance. You may choose the final beneficiary, be it the Foundation or another organization. Or, the fund may remain in the trust of the Foundation with annual distributions or under the care of a successive advisor of your choosing.

## A FLEXIBLE, LOW COST ALTERNATIVE TO A PRIVATE FOUNDATION

A Donor Advised Fund (DAF) offers you a flexible and easy-to-establish vehicle for charitable giving. Unlike private foundation (PF) gifts, DAF gifts generally qualify for a full fair market value charitable deduction and DAFs have lower startup costs. A DAF also permits you to make grants to charity without the unfavorable PF restrictions and excise taxes.

## RECOMMENDING YOUR GIFTS TO OUR ORGANIZATION

Once your account is open, you are ready to begin giving! Simply contact us in writing with your annual recommendations of how your DAF funds should be distributed. While we may not be legally obligated to distribute your funds as you desire, we seek to honor your wishes to help further the organizations and causes you love.

## IT'S EASY TO GET STARTED

Opening a DAF account is easy to do. Simply contact us for an application form and complete and sign the fund agreement. You may fund your account with a gift of cash, securities, real estate or other assets. Check with us if you have unique or special assets that may be donated in a tax efficient way. Call or click today!