

INCORPORATE A DONOR ADVISED FUND INTO YOUR ESTATE PLAN

The American Gift Fund is an independent national Donor Advised Fund (DAF) sponsoring organization, established as a 501(c)(3) public charity.



The
American
Gift Fund
STEP UP YOUR GIVING

PLANNED FUTURE GIVING

By utilizing a DAF, planned future giving can be structured to occur either during one's lifetime or automatically at a future event. The flexibility of DAFs provide the opportunity to amplify your giving legacy, creating a reverberating impact on the charities you've supported throughout your lifetime.

BENEFITS

Incorporating a DAF within your overall estate plan can provide several impactful benefits, including the ability to remove assets from your taxable estate. DAFs allow you to create a giving legacy that can continue after your lifetime. By naming your DAF directly into your estate plan as a charitable beneficiary, you maintain the flexibility to update your legacy plan at any time with no additional cost or third-party involvement.

HOW TO INCLUDE YOUR DAF IN YOUR WILL OR TRUST?

To bequeath assets into your DAF, consider including the following sample language in your will/trust. We recommend consulting with your attorney/professional advisor to ensure the language is properly tailored to your specific needs.

SAMPLE LANGUAGE FOR TESTAMENTARY DAFs

IF YOU HAVE AN EXISTING DAF WITH AGF

I bequeath _____ (dollar amount) / _____ percent of my residuary estate to The American Gift Fund to be directed to _____ (name of your donor advised fund), account number _____. These assets will be managed according to the succession plan I have created and filed with The American Gift Fund.

IF YOU WANT A NEW DAF ESTABLISHED UPON YOUR PASSING

I bequeath _____ (dollar amount) / _____ percent of my residuary estate to The American Gift Fund to open a donor advised fund named _____ (DAF name). The establishment of this donor advised fund will be managed according to the succession plan I have created and filed with The American Gift Fund.

Your attorney/professional advisor can modify the sample language as appropriate to direct the Trustee/Executor of your will/trust to make a distribution to your DAF.

NAMING YOUR DAF AS A BENEFICIARY

Another option for making contributions into your DAF upon your passing is by naming your DAF as a beneficiary for an existing asset. Most beneficiary designation forms allow you to name a public charity. By listing The American Gift Fund, the asset can be directed directly towards your DAF.

LIFE INSURANCE POLICY

By naming your DAF as the beneficiary of your life insurance policy, the full amount of the contribution will be directed into your DAF and be available to support the charities you care about.

INDIVIDUAL RETIREMENT ACCOUNT

Naming your DAF as a direct beneficiary of your individual retirement account(s) can provide tax efficiencies for both your estate and your heirs upon your passing. An additional benefit is that the full amount of the contribution will be directed into your DAF and be available to support the charities you care about.

CHARITABLE TRUST

When you designate your DAF as the charitable beneficiary of a charitable trust, you'll enjoy the flexibility of structuring a customizable succession plan. This plan can support multiple charities over time, as opposed to naming a single charity.

INSTRUCTIONS FOR NAMING YOUR DAF AS A BENEFICIARY

1

Request a beneficiary form from the financial institution that administers the asset, which can typically be completed online.

2

Identify The American Gift Fund as the sole beneficiary or one of many beneficiaries. Also include the name of your DAF. (i.e., "for benefit of the _____ Fund").

3

If asked for the beneficiary's information:

EIN:
51-6506426

**AGF's Date of Establishment
(Date of Birth):**
01/15/1997

Address:
The American Gift Fund
4550 Linden Hill Road, Suite 200
Wilmington, DE 19808

Please notify The American Gift Fund of your intended plans by completing the [Establish a Testamentary DAF Form](#)

The American Gift Fund (AGF) is an independent 501(c)(3) public charity sponsoring a Donor Advised Fund program. Donors make irrevocable charitable contributions to AGF while maintaining the right to recommend grants to qualified organizations. AGF as a matter of policy, does not give tax, accounting, regulatory or legal advice. Rules in the areas of law, tax, and accounting are subject to change and open to varying interpretations. You should consult with your other advisors on the tax, accounting, and legal implications of actions you may take based on any strategies presented considering your own circumstances. Additional information may be found at: giffund.org

We're here to help. Contact us at:

agfteam@giftfund.org

americangiftfund@cnb.com

800-441-7698, option 2