

# Incorporate a Donor Advised Fund Into Your Estate Plan

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

## Planned future giving

Incorporating a donor advised fund (DAF) within your overall estate plan can provide several impactful benefits, including the ability to remove assets from your taxable estate. Making charitable contributions of assets into a DAF is a simple method to plan for future giving. DAFs also allow you to create a giving legacy that can continue after your lifetime.

Planned future giving can be accomplished by utilizing a DAF in a number of ways. 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.

## How to include your donor advised fund 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:	
<p><b>If you have an Existing DAF with AGF:</b></p>	<p>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.</p>
<p><b>If you want a New DAF established upon your passing:</b></p>	<p>I bequeath _____ (dollar amount) / _____ percent of my residuary estate to The American Gift Fund to open a donor advised fund called _____ (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.</p>
<p>Your attorney/professional advisor can modify the sample language as appropriate to direct the Trustee/Executor of your trust/will to make a distribution to your DAF.</p>	

**The American Gift Fund**  
4550 Linden Hill Road, Suite 200  
Wilmington, DE 19808  
[www.giftfund.org](http://www.giftfund.org)

This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before engaging in any transaction.

## Naming Your DAF as a Beneficiary

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

### 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.

### Individual retirement accounts:

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.

### 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.

### 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 social security number, you may provide AGF's Employer Identification Number: 51-6506426.
4. If asked for the beneficiary's date of birth, you may use AGF's date of establishment: 01/15/1997.
5. If asked for the beneficiary's address, you may use AGF's mailing address:  
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**Please notify The American Gift Fund of your intended plans by completing the [Establish a Testamentary DAF Form](#).**

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