



## Donor Advised Funds

A donor advised fund is like a charitable investment account, for the sole purpose of supporting charitable organizations that you care about. When you contribute cash, securities or other assets to a donor advised fund you are generally eligible to take an immediate tax deduction.

Those funds can then be invested for tax-free growth.

Besides being able to take funds for an immediate tax deduction, you can recommend grants to virtually any IRS-qualified public charity.

When you give, you want your charitable donations to be as effective as possible. Donor-advised funds are the fastest-growing charitable giving vehicle in the United States because they are one of the easiest and most tax-advantageous ways to give to charity.

## How a Donor Advised Fund Works.



### Make a tax-deductible donation.

Donate cash, stocks or non-publicly traded assets such as private business interests, crypto currency and private company stock to be eligible for an immediate tax deduction. A contribution to a donor-advised fund is an irrevocable commitment to charity; the funds cannot be returned to the donor or any other individual or used for any purpose other than grantmaking to charities.



### Grow your donation. Tax-free.

While you're deciding which charities to support, your donation can potentially grow, making available even more money for charities. Most sponsoring organizations have a variety of investment options from which you can recommend an investment strategy for your charitable dollars.



### Support charities you love. Now or over time.

You can support virtually any IRS-qualified public charity with grant recommendations from the donor-advised fund—from your local homeless shelter to your alma mater or religious institution. The public charity sponsoring your account will conduct due diligence to ensure the funds granted go to an IRS-qualified public charity and will be used for charitable purposes.

Catholic Charities advises you to consult with your attorney and/or tax planner to choose the best gift to fit your needs.

(Source: [FidelityCharitable.org](http://FidelityCharitable.org))