Donor-Advised Fund Strategies for 2026

Written by: Michael Meltzer
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Donor-advised funds have been around for nearly 100 years. But they are likely to truly demonstrate their usefulness these days, when the stock market has seen unprecedented growth.

Why? Because the recent gangbusters growth in the S&P 500 and Dow Jones Industrial Average, especially the surge of “Magnificent 7” tech companies and other key players in the build-out of AI infrastructure, has left many investors with overconcentrated positions. Those investors are facing huge capital gains taxes if they decide to lock in their appreciation or trim positions.

This is where a donor-advised fund can show its value. By contributing a portion of their long-term appreciated stocks to these charitable vehicles, investors can not only reduce their risk of having too much in one security but also reduce their tax burden.

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