

What is a **DAF**?

A Donor-Advised Fund (DAF) is a charitable giving vehicle that allows donors to contribute as frequently as they like and then recommend grants to their favorite charities from their personal fund. The fund is established through a public charity so donors can receive an immediate tax benefit on their contributions and avoid the capital gains tax on appreciated assets.

Is a **DAF** right for me?

Do you want to...

- Simplify your charitable giving
- Support multiple worthy charities
- Work with your trusted investment advisor to manage the assets in your DAF
- Give Anonymously

What are the **Benefits**?

- Leave a legacy
- Immediate income tax charitable deduction
- Organize your philanthropy
- Pass on your personal charitable assets
- Avoid capital gains
- Build an endowment
- Recommend anonymous grants

What **Assets** can I contribute?

Cash
Stocks
Mutual
Funds

Real Estate
Closely-held
Business Interests
IRAs

Bequests
Trust Interests
Life Insurance

What is the **Tocqueville Donor-Advised Fund Program**?

Tocqueville Donor-Advised Fund Program is a donor-advised fund (DAF) that offers increased flexibility for your charitable contributions and allows you to instill the idea of philanthropy in your family for generations to come. Tocqueville Donor-Advised Fund Program is a program of RCF.

How do I get started?

- 1 Complete the donor application with your financial advisor.
- 2 Create a name for your fund to include your family name or a title that reflects your philanthropic preference.
- 3 Make an initial contribution of cash or appreciated assets.
- 4 Work with your financial advisor to make recommendations on how your fund is invested.
- 5 Recommend grant distributions through your on-line giving account.

What are my options?

Contact our team to learn more about a donor-advised fund!

<https://tocqueville.donorfirstx.com> | 877-683-1162