## AN INVESTMENT FOR THE FUTURE ••••



A **Donor Advised Fund (DAF)** is like having your own foundation. The fund is invested for growth, which permits you to make annual gifts of income and principal while you are alive. When you pass away, your children may make recommendations for distributions from the fund for a number of years. If you establish a **DAF** with us, at the end of the term, the remaining fund balance will become an asset of our organization, helping us further our good work.

## How Can We Help?

- ☐ I have questions about donor advised funds.
- ☐ I would like more information on other charitable tax-planning options.
- ☐ Please refer me to a qualified attorney to help me with my plan.

The best way to contact me is by:
☐ Email ☐ Mail ☐ Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

GOOD SHEPHERD CATHOLIC SCHOOL

**Good Shepherd Catholic School**
800 Aiken Avenue
Perryville, MD 21903
•••
Catholic Diocese of Wilmington
1925 Delaware Avenue
Wilmington, DE 19806
302-573-3121
sheilamcgirl@cdow.org
cdow.legacy.org

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FUTURE GIVING

TAX DEDUCTIONS

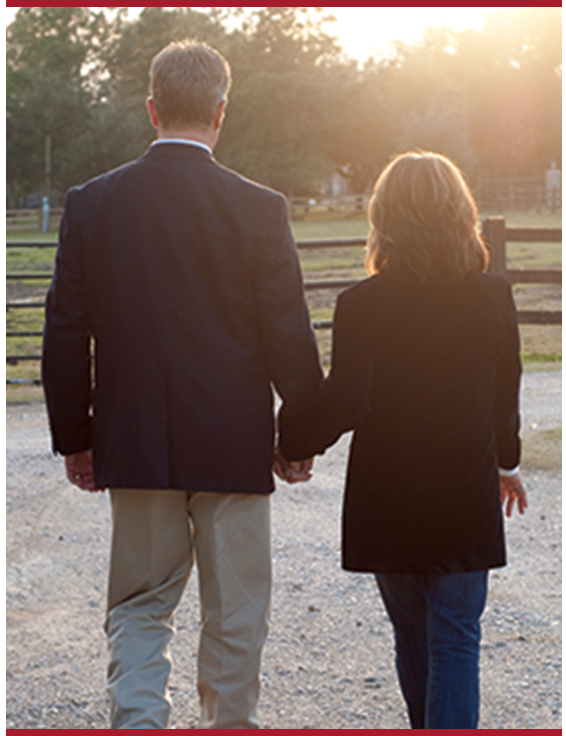
DONOR ADVISED FUNDS ••••



# •••• GIVING FOR THE FUTURE

GOOD SHEPHERD CATHOLIC SCHOOL

## THE GIFT THAT KEEPS ON GIVING



**How would you like to make a gift today that would enable you and your loved ones to continue to make charitable gifts in the future? When you make a gift to our organization of cash or other assets, we take your tax deductible contribution and establish a special account in your name. Your account is then invested to grow over time, permitting you to recommend annual gifts to your favorite charities.**

## A FLEXIBLE, LOW COST ALTERNATIVE TO A PRIVATE FOUNDATION

A **Donor Advised Fund (DAF)** offers you a flexible and easy-to-establish vehicle for charitable giving. Unlike private foundation gifts, **DAF** gifts generally qualify for a full fair market value charitable deduction and have lower startup costs. A **DAF** also permits you to make grants to charity without the unfavorable private foundation restrictions and excise taxes.

## THE EASE AND BENEFITS OF A DAF

Opening a **DAF** account is easy. Contact us for an application form, and complete and sign the fund agreement. You may fund your account with a gift of cash, securities, real estate or other assets. Check with us if you have unique or special assets that may be donated in a tax efficient way.

## RECOMMENDING YOUR GIFTS TO CHARITY

Once your account is open, you are ready to begin giving. Simply contact us in writing with your annual recommendations of how your **DAF** funds should be distributed. While we as a public charitable organization may not be legally obligated to distribute your funds as you desire, we seek to honor your wishes to help further the organizations and causes you love.

## MAKING A GIFT THAT LASTS

Bill is 55 and wishes to establish a fund that will make current and future gifts to his favorite charities. Bill makes a gift of $10,000 worth of securities to create a **DAF** and recommends two charities to receive fund distributions this year. When Bill passes away, his children will have the right to recommend gifts from the fund. He is thrilled that he can pass on his legacy of giving to charity and his family with his **DAF.**



The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.