



MOORE PHILANTHROPY

## DONOR ADVISED FUND SERVICES

### WHAT IS A DONOR ADVISED FUND?

A donor advised fund (DAF) is an efficient and flexible giving solution that provides immediate tax benefits. DAFs allow you to make grant recommendations to the causes you love on your own timetable. Grants can be made to eligible nonprofit organizations in the U.S. or abroad.

### HOW DO WE MANAGE YOUR DONOR ADVISED FUND?

- The donor makes tax-deductible gifts to their DAF.
- The donor identifies and recommends charitable projects and organizations to whom they want to give.
- We conduct due diligence on the grant's eligibility.
- We disburse grant funds to fully-vetted nonprofits.

### OUR DONOR ADVISED FUND SERVICES

We offer two kinds of donor advised funds - a traditional DAF or a Mockingbird Account - making this tax-efficient giving vehicle accessible at any supporter level.

Minimums & Features	Traditional DAF	Mockingbird Account
Minimum gift to open a fund	\$5,000	\$200
Minimum grant amount	\$500	N/A
Required annual disbursement	Yes (grants under \$25K limited to 12 per year. Unlimited disbursements for grants more than \$25K)	N/A
Make grants immediately	Yes	No (not until \$5,000 raised)
Assigned fund manager	Yes	Yes
Annual fee	\$500	Year 1: \$75 Year 2: \$125

### WHAT ARE THE BENEFITS OF OUR DAF?



**Support** the causes and issues most meaningful to you across the U.S. and abroad.



**Tap** into our philanthropic expertise.



**Customize** your fund name - after yourself or in honor of a family member, friend, or an organization.



**Keep** your giving confidential, if you so choose.



**Enjoy** low fees and high-touch services.



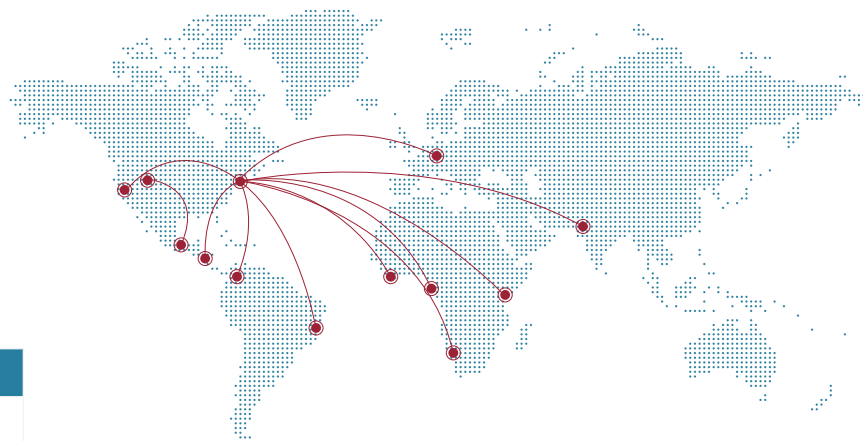
**Give** the DAF in the ways that you want - by check, ACH, wire transfer or donate appreciated assets.



**Engage** your family members and friends in your philanthropic goals.



**Count** on our back-office support to issue donor tax receipts, administer grant payments, and ensure compliance when making donations.



## WHAT ARE THE FEES?

Asset Amount	Rate*
Assets less than \$100,000	1.25%
Next \$100,000	1.0%
Next \$250,000	4.3%
Next \$500,000	3.0%
Next \$1,000,000	2.0%
Next \$5,000,000	1.0%

Administrative fees are assessed quarterly. Investment management and consulting fees related to the foundation's investment pools are charged separately. Special fees may be incurred for international grant recommendations. Third party payment processing fees apply. Additional fees may be charged for any mutually agreed-upon extraordinary legal, banking, or other services rendered on behalf of a fund.

## WHAT ARE THE TAX ADVANTAGES OF A DONOR ADVISED FUND?

- Receive the maximum tax deduction available.
- Deduct the value of your gift for tax purposes immediately.
- Bypass many of the restrictions imposed on private foundations.
- Avoid punitive estate taxes on gifts that you and your beneficiaries make to your fund.
- Avoid costly capital gains taxes while realizing the maximum tax-deductions for gifts of complex assets.

## FLEXIBLE GRANTMAKING

We enable you to recommend grants in the U.S. and internationally. Our staff are located throughout the U.S. to provide you with localized expertise. Our multilingual staff has deep networks abroad having lived in South America, Central America, Africa, Europe and Asia. Our diversity of experience helps streamline your varied philanthropic interests in one fund.

## ABOUT MOORE PHILANTHROPY AND MOORE IMPACT

Moore Philanthropy is a Black-owned and women-led philanthropic advisory firm and public charity providing thoughtful, strategic, and tailored philanthropic services to individuals, families, and organizations in the U.S. and abroad.

Moore Impact, a collaborative partner and 501(c)(3) exempt entity, provides fiscal sponsorship to community leaders and donors, helping them bring to life their vision for a more just world. Moore Impact also serves as a sponsoring organization for Donor Advised Funds (DAFs), which provide a tax-exempt vehicle for individuals, families, affinity groups, and corporations to make a meaningful impact on the communities they serve.

## CONTACT US

Colorado | 2590 Welton Street, Suite 200, Denver, CO 80205  
347.979.7518 | [info@moorephilanthropy.com](mailto:info@moorephilanthropy.com)

To establish a Donor Advised Fund,  
contact [info@moorephilanthropy.com](mailto:info@moorephilanthropy.com).