



Assistance Dogs transforming lives.

DONOR-ADVISED FUNDS

How a Donor-Advised Fund Works



1. Individuals, families, companies, foundations, and other entities can start a Donor-Advised Fund account by making an irrevocable contribution of assets (cash, securities, or other financial instruments) into the Donor-Advised Fund account.
2. The assets are placed into a Donor-Advised Fund account where they can be invested and grow tax free.
3. The Donor-Advised Fund account holder immediately receives the maximum tax deduction that the IRS allows.
4. The Donor-Advised Fund account holder names the account, advisors, and any successors or charitable beneficiaries.
5. The Donor-Advised Account holder can recommend grants (charitable gifts) from the account to its/his/her favorite charity(ies).

For more information about Donor-Advised Funds, please consult your financial or tax advisor, accountant, or lawyer.