

Donor-Advised Fund



What Is a Donor-Advised Fund?

A donor-advised fund (DAF) is a charitable financial vehicle that allows donors to receive an immediate tax deduction and “advise” grants to charitable causes that align with their values. Donor-advised funds are one of the most efficient, flexible, and cost-effective giving vehicles.

Who Should Consider a Donor-Advised Fund?

- » Those who want to make a meaningful impact in their area of interest.
- » People seeking tax-efficient strategies for their philanthropic goals without the restrictions of private foundations.
- » Families that want to establish a long-term charitable plan and involve multiple generations in their philanthropic journey.
- » Individuals who want a streamlined way to manage their charitable giving.
- » Donors who value discretion in their charitable giving.

Benefits of a Donor-Advised Fund

Support your favorite nonprofits. Recommend contributions to your favorite nonprofits and review fund balances 24/7 through our secure online donor portal.

Flexible philanthropy. A donor-advised fund can be established by an individual, family, business, or organization. Use your donor-advised fund to recommend grants here in the East Bay or anywhere, and avoid restrictions required of private foundations.

Asset options. Use a wide variety of assets to establish or replenish a donor-advised fund beyond cash and publicly-traded stock—such as mutual funds, fine art, cryptocurrency, or privately held C-Corp or S-Corp shares—which other nonprofits may or may not be able to accept directly. Gifts of appreciated assets qualify for tax deductions at current fair market value (as opposed to a cost-basis when contributed to a private foundation) and avoid capital-gains taxes.

Strategic philanthropy. You have access to EBCF’s expert staff who can help you develop a strategic giving plan, identify nonprofits to invest in, engage your family, connect with other donors, and co-invest with others to make the greatest impact.

