Donor Advised Fund ALLOWS YOU TO:

- Establish your own charitable giving fund
- Receive a tax deduction
- Support the places you love when the time is right

HOW IT WORKS
- A Donor Advised Fund (DAF) is a fund you create to make gifts to charities over time.
- You establish a DAF through an organization that sponsors them, such as a financial firm, religious group, or local community foundation.
- You can fund your DAF with almost any kind of asset, including cash, securities, real estate, interests in closely held businesses, and mineral rights.
- You then recommend grants to the charities you support, when the time is right for you.

HOW YOU BENEFIT
- **Tax-efficiency:** You are eligible to receive a charitable income tax deduction when you contribute to your DAF, and investment growth in the DAF is usually tax-free.
- **Simplicity:** Record keeping, grants, and tax receipts are all handled by your DAF sponsor.
- **Strategic:** DAFs allow you to separate your tax planning from your philanthropic planning.
- **Family legacy:** Since family members can be named as successor advisers, DAFs function as a simpler version of a family foundation.

HOW CARLETON BENEFITS
- When you recommend a grant to Carleton from your DAF, you can support the Annual Fund, an endowed fund, or other special gift purpose.
- When you name Carleton as a successor beneficiary of your DAF, you help future students and faculty. The benefits of your gift are maximized when you leave a lump sum to Carleton, instead of a stream of gifts over time.

FOR MORE INFORMATION
- **Phone:** 800-492-2275 or 507-222-4200
- **Email:** planned-giving@carleton.edu
- **Web:** giftplanning.carleton.edu
- **Mail:** One North College Street, Northfield, Minnesota, 55057

**Disclosure:** This information is not intended as legal advice. Please consult your financial or tax adviser to learn if a DAF is appropriate for your situation.