

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.

PLANNING TIPS

- Different DAF sponsors provide different services and have different policies and procedures, including minimums and fees. Be sure to learn the details before choosing a sponsor.
- You can use a DAF grant to make gifts in honor or memory of significant people in your life.
- Contact us if you'd like to use your DAF to establish a new endowed fund, or to support a particular program or project. We welcome the opportunity to discuss your giving plans and questions.
- If you'd like to use your DAF to make a multi-year pledge, please let us know! We understand plans like these are flexible, and are not legally binding pledges.
- If you're already using a DAF to make current gifts to Carleton, thank you! Please also consider adding Carleton as a successor beneficiary. This type of gift also qualifies you for membership in the Joseph Lee Heywood Society. You may need to provide the following information:
 - **Legal Name:** Carleton College
 - **Tax ID Number:** 41-0694747
 - **Address:** One North College Street, Northfield, MN 55057

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.



Carleton