

# Donor Advised Funds (DAF) Guide

## TOOLKIT NAME

Comprehensive Stewardship Strategy

## DEVELOPED BY

Network Fundraising Services



## HOW TO USE THIS DOCUMENT

Network Fundraising Services is providing this guide to help you create and execute effective fundraising strategies for Donor Advised Fund (DAF) donors.

We recommend using this document as an internal guide that supports you in better understanding the opportunity of DAFs and getting started with implementing a DAF strategy.

Please note that this guide is a starting point and not legal advice. Specific strategies will vary by organization. We encourage you to consult with a professional advisor to ensure your DAF processes and procedures comply with IRS regulations.

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DAF GUIDE

# INTRODUCTION – WHAT IS A DAF?

## INTRODUCTION – WHAT IS A DAF?

### DAF 101

A Donor Advised Fund (DAF) is a charitable giving vehicle that can be thought of as a charitable savings account. DAFs offer a way for donors to make an up-front tax-deductible investment of assets in the markets, providing the opportunity for tax-free growth until the donor recommends specific organizations to receive the donations.

As you read and learn more about DAFs and DAF donors, note that while there are complexities, DAF donors should still be treated like regular donors. It is just how they make their donation and how it should be acknowledged that is different. As you'll read, DAFs and DAF donors are growing, which is why we are sharing this with you!

Every donor and giving pattern is unique, and **with the average DAF holder having an account size of \$141,000**, you should know that they may be potential major gift donors, if they are not already.

They also already have made their tax-deductible contributions to their DAF, meaning you do not need to wait until year-end to make your ask.

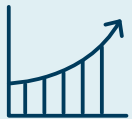
### Key Features of DAFs



Immediate tax deduction when contributions are made to the DAF



Ability to donate appreciated assets (stocks, real estate, etc.) without capital gains tax



Tax-free growth of assets within the fund



Option for anonymity when making grants to nonprofits



Simplified record-keeping for donors (one tax receipt rather than many)



Lower administrative burden compared to private foundations

DAF GUIDE

# GROWTH AND OPPORTUNITY IN DAF GIVING

## GROWTH AND OPPORTUNITY IN DAF GIVING

### DAF GIVING IS GROWING RAPIDLY

DAFs have experienced explosive growth over the past decade, making them one of the fastest-growing vehicles for charitable giving in the United States.

According to the National Philanthropic Trust's [2024 Donor-Advised Fund Report](#):

- Assets held in DAFs now exceed \$250 billion in the United States.
- Annual payout rates from DAFs consistently exceed 20% (compared to the 5% minimum required of private foundations).
- Annual grants from DAFs to qualified charities now exceed \$54 billion.

From the DAFGiving360 (formerly Schwab Charitable) 2024 report:



**72% of grants** were unrestricted



**33% of grants** were set up as recurring grants



**64% of contributions** were in the form of non-cash assets

### WHY THIS MATTERS FOR FUNDRAISERS

- DAF donors can provide **more regular, consistent sources of funding**.
- DAF donors tend to view their Donor-Advised Fund accounts alongside their investment portfolios, leading them to approach charitable giving with a similar **strategic mindset and long-term perspective**.
- DAF donors have **higher retention rates** than non-DAF donors. Once donors give via DAF, their [annual contributions to the same nonprofit rise by 96%](#) on average.

# TOP 5 STRATEGIES FOR MANAGING AND GROWING DAF GIVING

1. Establish a Gift Processing Protocol for DAF Gifts
2. Implement DAF Marketing & Communication Strategies
3. Thoughtfully Steward DAF Donors
4. Educate Your Major Gifts and Planned Giving Donors About DAFs
5. Build Relationships with Financial Advisors Connected to Your Cause

# 1. Establish a Gift Processing Protocol for DAF Gifts

Proper handling of DAF gifts requires specific procedures to ensure compliance, accurate donor records, and effective stewardship. This is becoming increasingly important as DAF giving grows drastically.

### Best Practices for When a Donor Recommends a Grant from a DAF:

- Hard credit the DAF or Community Foundation (CF) and soft credit the individual.
- Follow any stated acknowledgment instructions from the DAF/CF.
- Send an acknowledgment letter to the donor, but do not include content for a tax receipt.
- Remember that for tax purposes, the financial institution holding the DAF provides tax acknowledgment when the donor initially funds the DAF, not at the point the donation was made to your organization.
- Exclude DAF gifts from annual tax statements or acknowledge them separately from tax-deductible contributions.

### Important DAF Gift Restrictions:

- A gift from a DAF/CF cannot directly pay on a pledge from the donor.
- A pledge cannot be booked for donors who intend to give through a DAF/CF.
- Though it won't be booked in the system, donors wishing to make a pledge who will make payments from a DAF/CF can provide a letter of intent.

### SAMPLE LETTER OF INTENT LANGUAGE

*I/we intend to recommend a grant from my/our donor advised fund in the amount of \$XXX as follows:*

*A recurring grant from my/our donor-advised fund account to be paid every year/quarter (circle one) starting in \_\_\_\_\_ / \_\_\_\_\_ (month/year) and ending in \_\_\_\_\_ / \_\_\_\_\_ (month/year) in the amount of \$ \_\_\_\_\_ for a total of \$ \_\_\_\_\_. This grant will/will not (circle one) be restricted.*

*Please note that this is not a pledge. By signing this letter, I am informing XXX of my intention to make a recommendation only. This expression of intent does not create a legally enforceable obligation.*

# 1. Establish a Gift Processing Protocol For DAF Gifts

## Other Important Notes:

- DAFs cannot be used to make a gift that is not fully tax-deductible (e.g., an event ticket or an auction item).
- If a donor attempts to make such a gift, follow up directly to secure a different form of payment.
- Failure to comply with this restriction can lead to fines to the donor advisor and the organization by the IRS.

## Database Management:

- Tag DAF donors in your database with appropriate coding to make it easier to filter DAF donors in future communications and strategies.
- For the NAR (Network Activity Report): Report as Individual gifts, but the institution should receive the hard credit in your donor CRM
- Use different constituent codes at the account level and gift level (if this functionality is available in the donor database) or create 2 accounts for the institution — one coded as a Foundation for grant making and one coded as an Individual for DAFs



## 2. Implement DAF Marketing & Communication Strategies

### Website

#### WEBSITE SUGGESTIONS

Clearly communicating that DAFs are an available funding option can be crucial for educating donors.

- Add DAF giving options to your main donation form or include DAFs in an “Other Ways to Give” section.
- Consider adding DAF widgets like [DAF Direct](#) or [DAFpay](#) to your donation form.
- Many online fundraising platforms have integrated DAF payment options into their systems. Check with your current platform to find out if this is offered.
- Create a dedicated DAF page with your EIN, official legal name, and a point of contact.
- Provide a point of contact on your website if donors have questions about DAFs.
- Add donor stories that demonstrate the value other supporters get from having a DAF.



#### DONOR ADVISED FUNDS

The Los Angeles Regional Food Bank is now taking Donor Advised Funds. [Learn more here.](#)

[Read More >](#)

# 2. Implement DAF Marketing & Communication Strategies

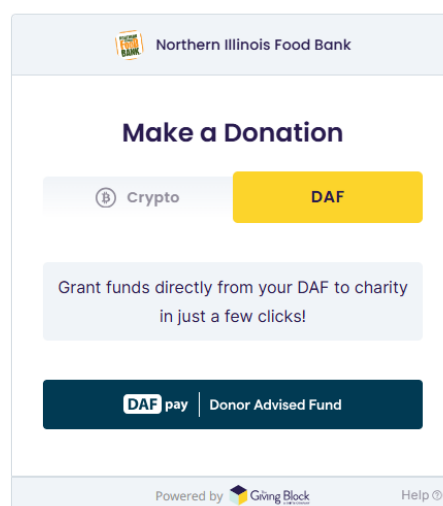
## Website, cont.

### EXAMPLES OF STRONG DAF WEBPAGES

- Northern Illinois Food Bank has a [Donation page](#) that mentions DAFs and links to an [Other Ways to Give page](#) (using The Giving Block/DAFpay).
- Food Bank of Northeast Georgia has a [Donation page](#) that includes a link to [Other Ways of Giving](#), which links to a [Donor-Advised Funds page](#) (using FreeWill tool).
- Los Angeles Regional Food Bank has a [DAF page](#) within their [Planned Giving Microsite](#) (that is available to members through a partnership with [Stelter](#)). They also have Donate dropdown with an [Other Ways to Give page](#) that links to a [Donor Advised Funds page](#) (using DAF Direct).
- Feeding America has a [Ways to Give page](#) that links to a [Donor Advised Funds page](#) (using the [Stelter Planned Giving Microsite](#) that is available to members).

### CRYPTOCURRENCY OR DONOR ADVISED FUNDS

You can make a gift to the Food Bank directly from your DAF. Or, you can request a gift from your fund using our convenient DAF portal below. Simply direct your financial institution to send the gift to the Food Bank. Gifts from DAFs will be acknowledged and used as directed by the advisor.



### Donor-Advised Funds

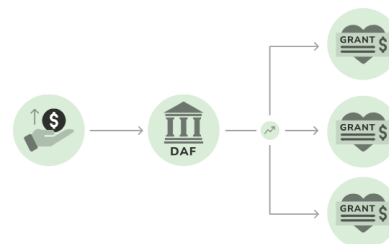
Easily recommend grants to Food Bank of Northeast Georgia for tax-efficient giving.

MAKE A DAF GRANT REQUEST

#### About Donor-Advised Funds

A Donor-Advised Fund (DAF) allows individuals to make charitable contributions and receive an immediate tax deduction. The funds are managed by a DAF custodian, and the donor can recommend grants to their preferred nonprofit organizations.

Donors can contribute to the fund over time and recommend grants to charities at their discretion, providing flexibility in their giving strategy.



# 2. Implement DAF Marketing & Communication Strategies

## Email

- Include DAF giving options in fundraising emails.
- Add educational content about DAF benefits to your newsletter.
- Create targeted campaigns for existing DAF donors.
- Add a P.S. to your emails and/or a line to staff email signatures: "You can give through your Donor Advised Fund. [Link to your DAF page]"

## Direct Mail


- Add DAF language to appeal letters and other direct mail pieces.
- Include a separate insert explaining DAF giving in appropriate mailings.
- Acknowledge DAF as a giving option in reply devices.
- A donor's DAF gift can be used with named recognition for challenge matches.

**Did you know you can donate to Second Harvest Food Bank through your Donor Advised Fund (DAF)?**


Having a DAF allows you to support your favorite nonprofit organizations while growing your assets and maximizing your future giving potential.

Making a gift through your DAF is simple and goes to work immediately to help your neighbors facing hunger.


**Learn more about giving through your Donor Advised Fund**



Scan the QR code



Go to [shfbgift.org/DAF](https://shfbgift.org/DAF)



Contact our Chief Development Officer: Greg Higginson | 407-514-1021 [ghigginson@feedhopenow.org](mailto:ghigginson@feedhopenow.org)

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**FOOD BANK**  
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<Address1>  
<Address1>  
<Address2>  
<City>, <State> <Zip>

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## 2. Implement DAF Marketing & Communication Strategies

### Events

- Include DAF information in event materials.
- Train event staff to discuss DAF options with attendees.
- Ensure DAF giving is mentioned during appropriate moments in the program.
- Remember: DAFs cannot be used to make a gift that is not fully tax-deductible (e.g., purchasing an event ticket).

### Campaigns

- Add language and a clear call to action for using a DAF in any donation form or campaign that is DAF eligible.
- Consider adding DAF language and links to capital campaign materials.



## 2. Implement DAF Marketing & Communication Strategies

### Peer-to-Peer Fundraising

- Educate team captains about DAF giving options.
- Include DAF giving options in ways to give to the campaign.
- Encourage people who give with their DAF to check if their gift can be matched by their employer, as some companies will match DAF gifts made by employees. Employers will have their own eligibility requirements.

### Board Engagement

- Ask your board members if they have DAFs.
- Encourage board members to consider DAF giving.
- Provide board members with talking points about DAF giving.



### 3. Thoughtfully Steward DAF Donors

As you continue to refine your fundraising segmentation approach, DAF donors could be another segment of donors who you uniquely engage.

DAF donors represent some of your most committed supporters and benefit from customized stewardship approaches.

Researching these donors often requires additional effort since full contact details aren't typically shared through DAF sponsoring organizations. While this research is valuable, understand that it requires extra time and resources.

#### **ACKNOWLEDGMENT AND MESSAGING GUIDANCE FOR DAF DONORS**

Recommending grants from a DAF is not tax-deductible; only contributions to a DAF are tax-deductible. Therefore, DAF donors need an acknowledgment, not a tax receipt.

DAF giving tends to be more balanced throughout the year since gifts out of a DAF are not a tax-deductible event. Messaging that highlights the urgency of year-end giving for tax purposes won't be as relevant with DAF donors.

#### **PRIORITIZE ENGAGEMENT AND IMMEDIATE ACKNOWLEDGMENT**

Because DAF donor information often is not readily available, many organizations don't engage with DAF donors individually. DAF donors are used to never hearing from an organization after they support them through their DAF. Therefore, engagement rates with thank you emails tend to be high because the DAF donor is happy to be acknowledged for their support.

While it takes effort to match up a fund name with an existing donor record or follow up with the provider for more details, reaching out to DAF donors who aren't used to being thanked can result in continued support and deeper engagement in your mission.



### 3. Thoughtfully Steward DAF Donors

#### ONGOING STEWARDSHIP AND RELATIONSHIP BUILDING WITH DAF DONORS

Regardless of the size of a DAF gift, the fact that a donor gave a gift using their DAF is a valuable indicator of wealth and giving capacity. Showing a donor that you understand how they like to give goes a long way in building your relationship, so it’s a good idea to mention a donor’s DAF in subsequent outreach.

As with any relationship-based fundraising approach, find ways to share impact and engage the donor more deeply in your mission before the next ask. Initiate personalized outreach from a leader at your organization, extend an invitation for a tour, thank them with a phone call or handwritten note, etc.

#### STEWARDSHIP TIMELINE EXAMPLE



**Within 48 hours:** Initial acknowledgment

**Within 2 weeks:** Personal thank you from program staff or leadership



**Quarterly:** Program updates with specific impact information

**Annually:** Comprehensive impact report and invitation to special event

**Ongoing:** Regular touchpoints independent of additional gift requests

For more ideas, we encourage you to view the [Comprehensive Stewardship Strategy toolkit](#)

## 4. Educate Your Major Gifts and Planned Giving Donors About DAFs

Many donors are unaware of the benefits of DAFs or how to establish one. Proactive education can expand your DAF donor base.

### WHERE DAFS FIT INTO MAJOR GIVING AND PLANNED GIVING

DAFs have experienced remarkable growth in recent years. Over the past five years, both assets held in DAFs and the annual grants distributed have roughly doubled. In 2023 alone, assets grew by 10%, signaling a strong trajectory for continued expansion.

While DAF donations tend to be larger, DAF donors give gifts of all sizes.

**When a donor makes a gift with a DAF, it communicates:**

#### 1. Their seriousness about philanthropy

Using a DAF can indicate that the donor is taking a thoughtful, long-term approach to their personal philanthropy. The structure of DAFs encourages donors to plan their giving and engage with causes in a more intentional way.

#### 2. Their potential giving capacity

In 2023, the average DAF account size was about \$141,000. Even if a donor's first DAF gift is small, the fact that they have established a DAF indicates a significant potential for larger contributions.

#### 3. Planned giving opportunity

DAF donors can designate beneficiaries for their funds, creating a great opportunity for planned giving. Many DAF donors don't realize that they need to designate a beneficiary for their DAF.



## 4. Educate Your Major Gifts and Planned Giving Donors About DAFs

### Education Strategies

#### **EDUCATE YOUR ENTIRE TEAM**

- DAF gifts shouldn't be siloed within one part of your organization.
- When a donor contributes via DAF—even if it is at an event or during a peer-to-peer campaign—flag that donor for the Major Gifts and Planned Giving teams.
- Help your colleagues with increasing their DAF knowledge by hosting internal trainings and sharing real-life donor stories.

#### **FOLLOW YOUR DONORS' LEAD**

- When a donor brings up their DAF, ask if they are interested in learning more about giving through their DAF.
- While fundraisers are not financial advisors, you can discuss DAFs without offering financial advice.
- Use the conversation as an opportunity to learn about donors' giving preferences.

#### **PROVIDE RESOURCES**

- Develop simple explanatory materials about DAF benefits and processes.
- Host DAF information sessions with financial advisors as speakers.
- Train gift officers to discuss DAF options during donor meetings.
- Create a DAF FAQ section on your website.
- Highlight the tax advantages of contributing appreciated assets to DAFs.
- Position DAFs as complementary to other planned giving vehicles.

# 4. Educate Your Major Gifts and Planned Giving Donors About DAFs

### KEY EDUCATIONAL MESSAGES

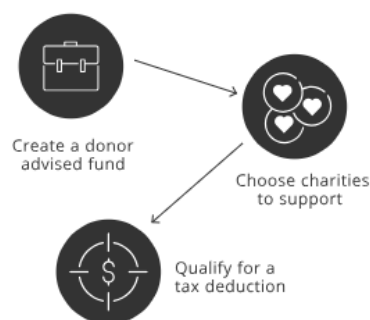
- DAFs provide immediate tax benefits with flexible distribution timing.
- DAFs simplify charitable giving record-keeping and administration.
- DAFs enable strategic philanthropy through growing assets.
- DAFs can be excellent alternatives to creating private foundations.
- DAFs can accept complex assets that might be difficult for nonprofits to handle directly.
- DAFs can serve as family philanthropy vehicles, involving multiple generations.

### INFOGRAPHIC AND EXAMPLE FROM PLANNEDGIVING.FEEDINGAMERICA.ORG

#### Donor Advised Funds

#### An Example of How It Works

Taylor and Sam want to give back to their hometown by putting their money where it will do the most good. They establish a \$25,000 donor advised fund with a community foundation. The couple receives a federal income tax charitable deduction for the amount of the gift. After researching community needs with the foundation's staff, they recommend grants for Feeding America (which they've supported for years) and a local charity. The foundation presents the charities with checks from the Patricia Fund, which they named in honor of Taylor's mother. Taylor and Sam name Feeding America as the beneficiary to receive the account balance after their lifetimes.



#### Tip: Convert Complex Assets

If you want to donate real estate, tangible personal property or business interests, but your charity of choice is unable to accept these gifts, consider donating the assets to your donor advised fund.

## 5. Build Relationships with Financial Advisors Connected to Your Cause

### WHY FINANCIAL ADVISORS MATTER

Professional wealth advisors play a key role in charitable donation strategies and can influence DAF contributions to your nonprofit. Financial advisors are often the go-to professionals for guiding donors through charitable giving decisions. Even though they don't typically make direct recommendations to clients, it's good for your organization to be top of mind.

### FINANCIAL ADVISOR RELATIONSHIP BUILDING STRATEGIES

#### Identify Connected Advisors

- ✓ Look for advisors already connected to your organization through donors, board members or volunteers.
- ✓ Research which financial firms in your area manage the most DAF accounts.

#### Provide Educational Resources

- ✓ Create resources or educational downloads that highlight the advantages of DAFs.
- ✓ Make it easier for advisors to share DAF information with their clients and colleagues.
- ✓ Develop advisor-specific materials on giving options.

#### Host Events

- ✓ Invite advisors to educational events about your mission and impact.
- ✓ Offer to speak at advisor professional development events.
- ✓ Provide continuing education opportunities related to charitable planning.

## 5. Build Relationships with Financial Advisors Connected to Your Cause

### Establish a Professional Network

- ✓ Create an advisor network or professional council.
- ✓ Host quarterly advisor roundtables or annual advisor appreciation events.
- ✓ Recognize advisors who promote charitable giving to your organization.

### Be a Resource

- ✓ Position yourself as a resource for advisors on charitable planning questions.
- ✓ Offer site visits so advisors can see your programs in action.
- ✓ Host "lunch and learn" sessions at advisor offices.

### Advisor Engagement Program Elements

- Quarterly newsletter with program updates and giving opportunities
- Annual advisor appreciation event
- Technical webinars on charitable giving strategies and tax benefits
- Site visits to see programs in action



DAF GUIDE

# CONCLUSION & ADDITIONAL RESOURCES

## CONCLUSION & ADDITIONAL RESOURCES

### CONCLUSION

Implementing a comprehensive DAF strategy requires organizational commitment, staff training, systems development, and consistent execution.

When done effectively, DAF fundraising can become a reliable and growing revenue source.

#### Key Takeaways:

- Educate your entire donor base about Donor-Advised Funds, not just major donors or existing DAF users. By broadening your DAF messaging to reach all supporters, you create opportunities to discover new major gift potential among donors who may benefit from giving through their DAF.
- DAF donors are some of your most committed supporters
- They have already set charitable funds aside and are looking for meaningful opportunities to create impact
- By making DAF giving easy, recognized, and impactful, you position your organization to capture a larger share of this growing philanthropic resource
- Lead with your mission, not technical details
- Remember that all fundraising efforts should work in harmony to support one another

Start by assessing your current DAF giving levels, identifying existing DAF donors in your database, and developing a phased implementation plan for the strategies outlined in this guide.

Consider starting with gift processing protocols and basic marketing inclusion, then expand to more sophisticated stewardship efforts and financial advisor relationship building.

### ADDITIONAL RESOURCES

- [National Philanthropic Trust DAF Report](#) (annual statistics and trends)
- [DAF Fundraising Report 2025](#)
- [DAFpay](#) (DAF payment tool)
- [DAF Direct](#) (widget for DAF giving)
- [Freewill](#) (planned giving microsite)
- [Stelter](#) (Click on “Planned Giving Microsite” for information about a customizable planned giving microsite)



DAF GUIDE

# DAF MARKETING EXAMPLES FROM NETWORK MEMBERS

## NETWORK EXAMPLES

### DAF MARKETING EXAMPLES FROM NETWORK MEMBERS

There are many ways that you can share about the opportunity to give to your organization through a DAF, and your network colleagues have generously provided the following examples as inspiration for your efforts.

Check out the full versions of these resources in the DAF Marketing Examples zip folder in the network examples section of the [Comprehensive Stewardship Strategy toolkit](#).

#### Blog Post

Los Angeles Regional Food Bank blog post on [Your 2025 Giving Guide](#)

### Your 2025 Giving Guide

*Published on January 02, 2025*

*Last updated on January 02, 2025 at 10:35 am*

#### By choosing to support the Food Bank, you're helping feed hundreds of thousands of our neighbors each month.

When you support the Los Angeles Regional Food Bank, you are making a meaningful difference for our neighbors facing food insecurity while potentially benefiting from valuable tax advantages. The following are different ways you can help fight food insecurity in Los Angeles County.



#### Donate Time

There's a reason why volunteering at the Food Bank is one of the top volunteer opportunities in LA County. Tens of thousands of volunteers turn to one of the two Food Bank warehouses where, in just three hours of their day, they're able to sort, glean and pack nutritious food items for families in need. Companies also choose to bring their employees to volunteer at the Food Bank as it is a fun, team-building experience for everyone involved. [Learn more about volunteer opportunities at the Food Bank>](#)

**RELATED:** [The Health Benefits of Volunteering at the Food Bank](#)

#### Donate Financially

If you are able to do so, consider donating financially to the Food Bank. There are plenty of ways that you can make a financial contribution and make a difference in your community. While a **one-time donation** is always welcome, the following are some other ways you can contribute.

**Donate Monthly:** For less than one dollar a day, your monthly donation goes a long way for someone who is struggling to have three meals a day.

**IRA Charitable Rollover:** If you are 70½ or older, you can donate up to \$108,000 annually from your IRA without incurring income taxes.

**Gifts of Stock:** Donating appreciated stock can be one of the most efficient ways to support the Food Bank. Avoid capital gains and get a tax deduction for the full market value of your stock by transferring directly to the Food Bank.

**Donor-Advised Fund (DAF):** This flexible giving account allows you to recommend grants to the Food Bank as part of your charitable planning.



# NETWORK EXAMPLES

## Websites

Feeding America's Legacy Guide to Maximize the Impact of Donor Advised Funds  
[Link to Full Guide](#)

### Donor Advised Funds

#### Stay Up to Date

Review your donor advised fund investment strategy regularly, just as you would to maintain any other investment. You may also want to consider socially responsible investments—those that meet the highest environmental, social and governance standards.

#### Unique Strategies Using Your Fund

Name a donor advised fund as a beneficiary of all or part of your retirement plan assets. Not only will your donor advised fund receive these assets tax-free, but you can also name your loved ones as successor advisors to continue your legacy of giving.

Divide and multiply your legacy. Perhaps your loved ones have differing charitable passions. Consider dividing your donor advised fund into multiple accounts or creating separate accounts—one for each loved one. That way, after your passing, each successor can create their own legacy of giving by recommending grants to the causes that are important to them.

Recommend recurring gifts. You can set up a plan to recommend grants to Feeding America on an ongoing monthly, quarterly, semiannual or annual basis.

#### A Tax-Smart Solution



To maximize your tax advantages, use a strategy known as bunching. To get started:

- Make a gift this year equal to or above your projected charitable giving over the next several years and large enough to exceed your standard tax deduction.
- Recommend distributions to your favorite charities in the coming years.

NETWORK EXAMPLES

Email Communications

God’s Pantry Food Bank & Los Angeles Regional Food Bank



God’s Pantry Food Bank has partnered with FreeWill to help you easily navigate charitable contributions through planned giving at no cost. And by using their SmartGiving tools, you can save while giving tax-smart gifts.

Donating through Donor-Advised Funds (DAFs), Qualified Charitable Distributions (QCDs), and stock gifts maximizes your impact while optimizing your financial strategy. Each option brings unique tax advantages.

Save and Give Today!



GIVE NOW

Wishing you a joyful holiday season.



Ways to Give



**Cash Gift**  
Make a one-time gift by check or credit card to fight hunger in our community or set up a monthly gift to fight hunger year-round. You can also honor or memorialize someone special with your gift.  
  
Mail to: 1734 East 41st Street, Los Angeles, California 90058 or visit: [LAFoodBank.org/donate](https://LAFoodBank.org/donate)



**Donor Advised Fund\***  
Allows you to combine favorable tax benefits with the flexibility to easily support the Los Angeles Regional Food Bank and distribute healthy food to your neighbors in Los Angeles County.  
  
[LAFoodBank.org/daf](https://LAFoodBank.org/daf)



**Securities**  
Maximize your investments by donating stock, mutual funds or bonds.  
  
For more information call Roger Castle at (323) 234-3030 x147 or email [rcastle@lafoodbank.org](mailto:rcastle@lafoodbank.org)



**Employer Matching Gift**  
Many companies sponsor matching gift programs that will match contributions made by their employees.  
  
See if your company does at: [LAFoodBank.org/match](https://LAFoodBank.org/match)



**Legacy Gift**  
A legacy gift will ensure that the Food Bank can mobilize resources to fight hunger in our community well into the future. Consider including the Food Bank in your will, trust or beneficiary designations for your retirement assets or insurance.



**IRA Charitable Rollover (QCD)\***  
If you are 70 ½ or older, you can give any amount (up to a maximum of \$105,000) per year from your IRA directly to a qualified charity such as the Los Angeles Regional Food Bank without having to pay income taxes on the money.

</FILLNAME>,  
  
By supporting the Los Angeles Regional Food Bank, **you are making a meaningful difference for our neighbors facing food insecurity while potentially benefiting from valuable tax advantages.** Here are several giving options that may be appreciated by both you and your accountant:

**IRA Charitable Rollover:** If you are 70½ or older, you can donate up to \$105,000 annually from your IRA without incurring income taxes.

**Gifts of Stock:** Donating appreciated stock can be one of the most efficient ways to support the Food Bank.

**Donor-Advised Fund (DAF):** This flexible giving account allows you to recommend grants to the Food Bank as part of your charitable planning.

**Legacy Gift:** Consider leaving a legacy by including the Food Bank in your estate plan.







**Direct Mail—continued**

Maryland Food Bank's Planned Giving Appeal



## Ending the Year Well

*Get a head start on your year-end tax planning.*

### **IRA Charitable Rollover**

Congress made permanent the law that allows people age 70½ or older who own an IRA to make gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution. Contact us to learn more.

### **Outright Gift of an Asset**

If you wish to make a gift to support our cause this year but are concerned about preserving your cash resources, consider a gift of an appreciated asset. A gift of securities, business interests or real estate can provide you with significant income and capital gains tax savings, often exceeding the benefits of a cash gift.

### **Donor Advised Fund (DAF)**

If you are looking for an end-of-year deduction but want more time to make thoughtful giving decisions, consider a donor advised fund (DAF). Our organization can use your tax deductible gift to establish a DAF in your name. You can make grants from your DAF now and in the future to support our work and other causes you care about.



### **Consider these worthwhile strategies before the year's end.**

#### **Selling securities, real estate or a business this year?**

Consider planning strategies to avoid capital gains tax

#### **Own an IRA and/or 401(k)?**

Maximize your deductible contributions

#### **Expect to be in a lower tax bracket or can control income?**

Shift income to this year

#### **Extra medical expenses?**

Establish a health savings account (HSA)

#### **Age 70½ or older?**

Make a gift from your IRA

#### **Expect to be in a higher tax bracket?**

Talk to your tax advisor for solutions to manage taxes

### Direct Mail—*continued*

#### Los Angeles Regional Food Bank's Tax Smart Giving Buckslip – front and back



**Gifts from your IRA:** If you're 70 ½ or older, a qualified charitable distribution (QCD) allows you to contribute up to \$108,000 directly to the Food Bank from your IRA. The amount you transfer will not count as income for the year and can count towards your annual required minimum distribution. Please request to include your name in the memo of your gift so that we may thank you.

**Gifts of Appreciated Stock or Mutual Fund Shares:** You may be able to increase your tax deduction while also avoiding capital gains tax, if you have owned the stock for more than one year. Please let us know the name and number of shares transferred so we may properly acknowledge your gift.

Be sure to consult your tax and financial advisors when considering any planned gift.

**Donor Advised Fund (DAF):** You can use your DAF to make a one-time or recurring grant. Please ask your DAF representative to include your name and address on the distribution.

**Have you considered including the Food Bank in your estate plans?** A legacy gift will ensure that the Food Bank can mobilize resources to fight hunger in our community well into the future. Consider including the Food Bank in your will, trust or beneficiary designations for your retirement assets or insurance.

The Los Angeles Regional Food Bank is a 501 (c)3 nonprofit organization. EIN: 95-3135649



### Educational Materials for Relationship Managers to Share with Donors in Portfolios

#### God's Pantry Food Bank

## SMART WAYS TO SUPPORT GOD'S PANTRY FOOD BANK



#### DONOR-ADVISED FUND GRANTS

Donor-Advised Fund (DAF) grants are an increasingly popular way to support God's Pantry Food Bank — and there's a good reason! By giving through your DAF, you can use the funds you've already set aside to reduce hunger immediately.



Get started at  
[FreeWill.com/DAF/godspantry.org](https://FreeWill.com/DAF/godspantry.org)

#### IRA GIVING

For God's Pantry Food Bank supporters age 70.5 or older, IRA gifts present a powerful way to save while you give. Generally speaking, IRA gifts are always tax-free and can help you reduce your future tax burden, satisfy a Required Minimum Distribution (RMD) if you have to take one, while supporting our mission to reduce hunger by working together to feed Kentucky communities.



Get started at  
[FreeWill.com/QCD/godspantry.org](https://FreeWill.com/QCD/godspantry.org)

#### STOCK GIVING

Donating appreciated assets avoids federal capital gains taxes and provides a federal income tax deduction for the current market value of the gift. Similar state tax benefits are also provided in most of the country. Most importantly, you'll be making a powerful difference in our vision of a nourished life for every Kentuckian.



Get started at  
[FreeWill.com/Stocks/godspantry.org](https://FreeWill.com/Stocks/godspantry.org)



**Questions?** Alex Maddox at  
[amaddox@godspantry.org](mailto:amaddox@godspantry.org)



## NETWORK EXAMPLES

### Connecting with Financial Advisors

#### Feeding America's Sample Email to Financial Advisors

##### Introductory Email to a Wealth Advisor (Community Foundation or an Investment Firm)

Dear **NAME**,

I am writing to introduce you and your clients to Feeding America. I would welcome an opportunity to meet to demonstrate how Feeding America is working with philanthropic individuals to make a difference in the fight to end hunger in the U.S.

As you may know, the Feeding America network is the nation's largest domestic hunger-relief organization. Through a network of more than 200 food banks, 21 statewide food bank associations, and over 60,000 partner agencies, food pantries and meal programs, Feeding America provided 5.9 billion meals to tens of millions of people in need last year. We also support programs that prevent food waste and improve food security among the people we serve; bring attention to the social and systemic barriers that contribute to food insecurity in our nation; and advocate for legislation that protects people from going hungry.

#### Info Packet for Educating Financial Advisors on DAF Giving to Support FANO

## CONNECTING YOU, YOUR COLLEAGUES AND CLIENTS TO FEEDING AMERICA

Feeding America® values the generous support it receives through Donor Advised Funds and understands the unique position wealth advisors play in connecting potential funders to our work. Feeding America relationship managers seek to be a resource to you and your colleagues to enable you to confidently speak about our organization, hunger relief and aspects of our work that may inspire donors.

**Group Presentations:** Feeding America welcomes the opportunity to present an overview of our work to groups of wealth managers.

**Support Materials:** In addition to information on [FeedingAmerica.org](https://www.feedingamerica.org), in the [Feeding America Annual Report](#) and [Feeding America Impact Reports](#), Feeding America relationship managers can provide overviews on many topics related to hunger relief.

**Frequently Asked Questions (FAQs) for Advisors:** Answers to common questions related to donor advised funds and their support of Feeding America are listed at the end of this document.

### Connecting with Financial Advisors—continued

#### Feeding America's Organizational Overview Deck for Educating Financial Advisors

##### We Invite You to Partner with Feeding America



**LEARN:** Visit [feedingamerica.org](https://feedingamerica.org) to learn more.



**FOOD:** Let us know if you have contacts in the food industry.



**FUNDS:** Financial donations are the most efficient way to help food banks.



**FRIENDS:** Use your voice to raise awareness of hunger and advocate for change.

