

Let Us Help You Create Your Legacy of Charitable Giving



Did You Know You Can Structure Your Donor-Advised Fund for Giving Beyond Your Lifetime?

A donor-advised fund is a simple, flexible, tax-efficient way to manage charitable giving, which is often an important component of financial, tax, and estate planning. Creating a Stifel Donor-Advised Fund allows you to develop a strategic charitable giving strategy, and focus on making an impact on the causes you care most about. Donors receive an immediate tax deduction for contributions into their Stifel Donor-Advised Fund and simplify their recordkeeping burden.

Who will carry out your legacy of charitable giving?

The successor advisors to your donor-advised fund will have full discretion to make grants from the fund after your lifetime. Think about who you want to name as your successor advisors. Your children? Other family members? Friends? Your attorney? Or, do you want to leave a plan for your grant-making to be implemented by Stifel Charitable Inc.?

How would you like to continue your legacy?

Do you want successor advisors to have complete flexibility when making grants? Or do you want to set guidelines for future grants through a Legacy Fund? For example, you may restrict grants to a certain geographic area or specific charitable causes and organizations.

For more information,
contact your
Stifel Financial Advisor.

How long would you like your philanthropy to continue?

Do you want to establish a spending policy to ensure giving can continue indefinitely? Do you want to outline when to make final grants from your fund? You are able to specify a timeline based on your charitable giving strategies.

There are many possibilities to consider for your charitable legacy. Here are some popular options among our clients:

- **Gather and unify.** Keep your donor-advised fund intact, and use it as a catalyst to gather your children or other successor advisors together. In this scenario, you determine whether successor advisors will make grant decisions independently, by majority, or unanimously. You may also pick one representative who will work directly with us.
- **Divide and multiply.** Split your donor-advised fund into multiple donor-advised funds, so each successor advisor has his or her own fund. You might consider splitting the fund during your lifetime, so you can enjoy sharing your legacy.
- **Leave the work to us.** Stifel Charitable Inc. can manage the grant-making from your Legacy Fund. We will work with you to document your charitable intentions to ensure we stay true to your goals after you are no longer able to do so.
- **Hybrid.** Customize the elements you want to include as part of your charitable legacy. We can make grants to your favorite charities immediately after your lifetime, and then let your successor advisors grant out the remaining donor-advised fund assets over time in their own way.

STIFEL | Donor-Advised Funds

Stifel Donor-Advised Funds are handled by Stifel Charitable Inc., which is a 501(c)(3) non-profit organization. Stifel Financial Corp. companies, including Stifel, Nicolaus & Company, Incorporated, Stifel Bank, and Stifel Trust Company, N.A., provide services to Stifel Charitable Inc. Stifel does not provide legal or tax advice. You should consult with your legal and tax advisors regarding your particular situation.