



Introducing the Stifel Donor-Advised Fund

Charitable giving is often an important component of financial, tax, and estate planning. Creating a strategic charitable giving plan can help maximize your tax benefits and reduce your record-keeping burden. Creating a Stifel Donor-Advised Fund allows you to focus on making an impact on the causes **you care** most about.



**For more information, contact your
Stifel Financial Advisor.**

- A donor-advised fund is a simple, flexible, tax-efficient way to manage charitable giving.
- Donors receive an immediate tax deduction for contributions into their Stifel Donor-Advised Fund.
- Gifts of appreciated securities are eligible to receive Fair Market Value deductions, typically creating significant capital gains tax savings.
- Your Stifel Financial Advisor will work alongside you and Stifel Charitable Inc. to invest your contributions. Your Stifel Donor-Advised Fund assets can grow tax-free until you are ready to begin recommending grant distributions to the qualified nonprofit organizations of your choice.
- You can name successor advisors, such as children or trusted family members, to continue your tradition of giving for generations to come. Or, you can create a Stifel Legacy Fund to ensure your fund continues supporting the causes you care most about, even after you are gone.
- Currently, gifts to a Stifel Donor-Advised Fund are eligible to receive tax deductions of up to 60% of adjusted gross income (AGI) for cash contributions and up to 30% of AGI for appreciated securities, both with a five-year carryforward allowance.
- You can choose when to recommend grant distributions to any IRS-qualified nonprofit organization in the United States, or even internationally, with no annual mandatory minimum.
- Your Stifel Donor-Advised Fund offers online access, making it easy to check fund balances, view account activity, and make grant distribution recommendations.
- Simply complete a Stifel Charitable New Fund Agreement, contribute assets to your fund account, and begin making an impact on the causes you choose.
- And by the way, you will enjoy choosing a meaningful, personalized name for your fund, connecting you with your giving for years to come.

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.