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Donor Advised Funds

Take Control of Your Charitable Dollars

What Is a Donor Advised Fund?

A Donor Advised Fund (DAF) is an account you establish with an administrator such as the Midwest Methodist Foundation. Some institutions have minimum amounts and differing distribution requirements. However, all feature one benefit: You give to the fund when you want, then advise the administrator. This is an “advised” fund, so the administrator is not bound to follow your advice. However, administrators almost always follow the account holder’s advice unless there is a problem with the intended recipient.

A DAF is an account authorized by Congress and recognized by the Internal Revenue Service. Each time you contribute to your fund, you receive an income tax deduction.

Is a Donor Advised Fund Right for You?

If you like controlling the timing of your charitable giving and your income tax deduction, then a Donor Advised Fund makes sense. It’s generally easy to establish and is a hassle-free way of giving to your favorite causes.

May We Help You?

To learn more, please contact us. We welcome the opportunity to answer your questions and work with you and your advisors.



Get an income tax deduction now, give to charity later



Easily make contributions anonymously



Maximize your tax deductions

If any of these benefits appeal to you, then a Donor Advised Fund may be right for you. It allows you more control of your charitable dollars, especially for maximizing your charitable income tax deductions. Your account administrator invests the fund, and you can make gifts to charities from it when you want.

Benefits of a Donor Advised Fund

- Control the timing of your deduction and donation
- Effortlessly give anonymously to charity
- Pass ownership to children or friends to create a legacy

Other Considerations

- Receive an income tax deduction when you want
- Your account gives, not you, so your identity is revealed only if you want
- Your account can accept stock for capital gains benefits
- You can only advise the administrator, not direct the distributions

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