

Giving with Confidence: Quick Reference Guide



Our team is here to help you give with confidence and ensure you can meet your philanthropic goals in a tax-efficient manner. To support you, we review every grant to certify it complies with federal and state law. Below, you will find a quick reference guide to use when recommending grants from your Donor Advised Fund.

Gifts & Giving Methods Your Donor Advised Fund Supports

SUPPORT your favorite charities with grants in any amount, at any time.

GIFTS that only result in incidental recognition (like listing a name in a program or naming something after you or your family.)

EVENT SUPPORT - without benefits: If you would like to support an event and will not receive tickets or perks, please note this in your grant request.

If you have any questions about whether you can utilize your fund to support a particular cause, our team is just a phone call away!

Gifts & Giving Methods Best Supported in Another Way

GIFTS that result in event tickets, galas, golf outings, or tables (even if you cover the non-deductible portion yourself.)

MEMBERSHIPS that come with perks (like free entry, parking, or gifts.)

GRANTS that include a named individual to be supported.



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