

Raymond James Charitable Donor Advised Fund

Create a charitable legacy plan with immediate tax benefits and deductions.

Similar to a private foundation, a donor advised fund lets you donate to your favorite charities and receive immediate tax benefits and deductions, but with less expense and setup.

HOW DOES A DONOR ADVISED FUND WORK?

A donor advised fund, one of four account types administered by the Raymond James Charitable Endowment Fund, provides an easy way to make significant charitable gifts with immediate tax benefits and deductions. An agreement is created between you and the Raymond James Charitable Endowment Fund, which gives you the right to advise how portions of the charitable gifts are used.



WHAT ARE THE BENEFITS?

- Easy to set up and requires little administrative maintenance
- No capital gains tax on long-term appreciated assets that are gifted
- Receive immediate tax deduction for full market value of gift* for most assets
- No excise taxes like a private foundation
- Assets donated are no longer part of the estate value
- Makes a difference in people's lives and communities for years to come
- Carries on your legacy

To learn more about establishing a donor advised fund through the Raymond James Charitable Endowment Fund, talk to your Raymond James financial advisor. We recommend you work with your financial advisor alongside your legal and tax professionals to coordinate the most appropriate charitable solution for your situation.

*Any amount that can't be deducted in the current year can be carried over and deducted for up to five succeeding years.

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