

# Summary for Advisors

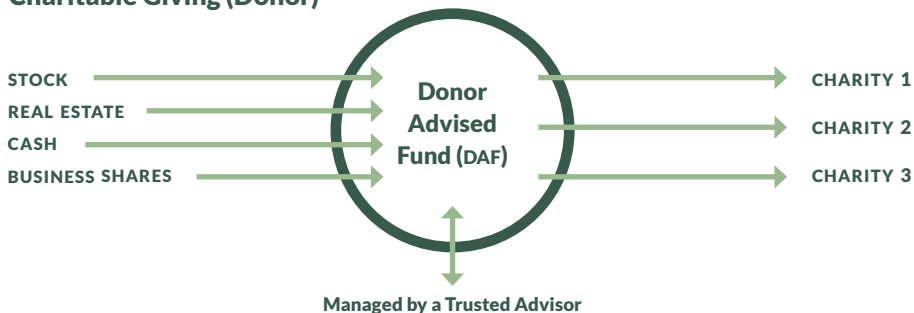


## Typical Client Scenarios

An AEF Donor Advised Fund (DAF) can be a solution for clients who:

- Have charitable intent and have been or will be active donors.
- Want their advisor to have added flexibility in managing their philanthropic assets.
- Have high income and want to set aside money for future gifting when income is less.
- Are approaching retirement, or who want to establish a fund while young.
- Want to manage and track their giving in a simple and more organized way.
- Desire or already have a private foundation but do not like its complexity or cost.
- Want to be able to give anonymously to certain charities.
- Need charitable deduction now but needs time to decide which charities to support.
- Plan to sell a business or anticipate a liquidity event.
- May want to sell assets such as real estate and other alternative investments.
- Cannot easily determine cost basis of assets that they or advisor want to sell.
- Strive to minimize taxes and receive biggest deduction when selling assets.
- Have fluctuating income that makes it difficult to maintain a steady level of giving.
- Want to engage family members in charitable giving to pass on family values.
- Want to donate to charities throughout their lifetime or in perpetuity.
- Question how best to support several charities through sale of one asset.

## Charitable Giving (Donor)



## Why American Endowment Foundation (AEF)?

Advisors can custody and manage assets on any platform at any asset level. They have unparalleled flexibility in selecting clients' DAF investments.

Flexibility in accepting a variety of simple or complex assets including cash, publicly traded securities, closely held stock, real estate, life insurance policies and more.

Giving timetable can be during lifetime or in perpetuity.

Preferred DAF of numerous independent broker dealers, RIAs, banks and custodian/clearing firms.

Donors can recommend grants to charities throughout the US and overseas.

Establishing a DAF can be simple, quick, and at no cost.

Personalized service as advisors and donors work with designated AEF staff.

Competitive pricing, no hidden fees or lengthy contracts.