**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)

<table>
<thead>
<tr>
<th>Donor Advised Fund (DAF)</th>
<th>CHARITY 1</th>
<th>CHARITY 2</th>
<th>CHARITY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>STOCK</td>
<td>Cash</td>
<td>Real Estate</td>
<td>Business Shares</td>
</tr>
</tbody>
</table>

Managed by a Trusted Advisor

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### 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.