Typical Client Scenarios
An AEF 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, farmland, or collectibles.
- 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>Stock</th>
<th>Charity 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real Estate</td>
<td>Charity 2</td>
</tr>
<tr>
<td>Cash</td>
<td>Charity 3</td>
</tr>
<tr>
<td>Business Shares</td>
<td>Managed by Trusted Advisor</td>
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</tbody>
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