

Top 12 Questions: When to Consider An AEF Donor Advised Fund



Financial advisors who know what to look for can uncover significant opportunities, increase assets under management, and benefit their prospects and current clients in ways that are tax-efficient, easy to implement, and impactful.

The 12 questions to ask clients and prospects are:

1. Do they own low basis stock, mutual funds, or other investments that they plan to sell?
2. Do they plan to sell a business or privately-held stock?
3. Do they own low-basis, illiquid assets such as real estate, cryptocurrencies, or commodities that they intend to sell?
4. Do they have a high annual income and want the highest allowable deduction?
5. Do they have a need for a deduction now, but want to take their time in deciding to which charities and how much they want to donate?
6. Do they plan to retire in the next decade and make significant contributions to charity in retirement when their income will be less?
7. Do they like the idea of a private foundation but do not like the complexity, burden, and expense of its administration?
8. Do they have charitable intent or are they already active donors?
9. Do they want to manage their charitable giving in a more organized and efficient way?
10. Do they occasionally or always need complete anonymity when making donations?
11. Do they want to engage their heirs and pass on family charitable values in the near future or in perpetuity?
12. Do they want their financial advisor to have substantial flexibility in managing their philanthropic assets, possibly including impact investing?



If a client answers “yes” to any or all of these, then a donor advised fund with AEF may be an ideal solution for clients and their advisors. AEF donors’ financial advisors manage the assets in their clients’ AEF DAF accounts at all amounts and with their preferred custodians. AEF is flexible in accepting donations of different types of assets and can hold some of these assets without requiring their immediate liquidation.