



American Endowment Foundation

AEF Advantages over Community Foundations or Single-issue Charities

PARTNERSHIPS WITH ADVISORS

American Endowment Foundation (AEF) is a truly independent donor advised fund (DAF). While many community foundations, universities, and other single-issue charities that offer donor advised funds only allow advisors to manage their clients' DAF assets at levels above \$500,000 or \$1,000,000 while others do not permit this at all, AEF allows advisors to manage these assets regardless of account size.

Because it is independent, AEF works with advisors from RIA's, broker-dealers, and banks on virtually all custodial platforms including Pershing, TDA, Fidelity, and Schwab. AEF does not offer its own investments and thus allows advisors to manage their clients' charitable assets without being forced to pick from a restricted family of funds or pools.

AEF donor advised fund accounts are portable, enabling advisors and their clients to keep their DAF accounts at AEF should the advisors change custodians or firms.

FLEXIBILITY

For over 25 years, AEF has accepted donations of a wide variety of assets, and is willing in many cases to hold these assets instead of requiring their immediate sale. AEF accepts donations of real estate, closely-held stock, insurance, private equity, and other complex assets valued at lower levels than many other DAF sponsors.

While some DAF sponsors prohibit or restrict grants outside their local or specific issue areas, AEF allows grants to be made to nearly all approved 501C3 charities (including community foundations) throughout the USA and abroad. This is especially relevant for multi-generational families that move throughout the country and have different interests.

AEF allows donors to recommend grants on their own timetable. Some other DAF sponsors require their donors to grant a certain amount or percentage back to the sponsor, do not allow accounts to continue in perpetuity, only allow a certain percentage of the account to be granted each year, and require fund balances to be distributed to the sponsor's endowment at the death of the donor or successor advisor.

For AEF donors that need the help and guidance of a Philanthropic Advisory firm to develop a mission, facilitate a family meeting, evaluate their past grantmaking, identify grantees, or support other activities, AEF is able to refer its donors to these firms, and in many cases, is able to pay for these services from their donors' accounts.

PERSONAL SERVICE AND SIZE

With over \$2 billion in assets and 5600 donor accounts, AEF has been the leading independent donor advised fund choice since 1993. AEF fees are less costly than most other community foundations or single-issue charities.

AEF is committed to maintaining the highest level of personal service and support to all donors and advisors. Each donor and financial advisor is uniquely assigned to an individual contact at AEF, regardless of the value of the account. Because of AEF's size and exclusive focus on donor-advised funds, grants are processed on a daily basis instead of weekly or monthly.