



American Endowment Foundation

AEF Advantages over Privately-Branded Donor Advised Funds

- 1** With over \$2 billion and 5600 accounts, AEF is very substantial with nearly 25 years of experience in managing donor advised fund accounts.
- 2** AEF is independent so it works with advisors on all custodial platforms including Pershing, TDA, Fidelity, Schwab and dozens of others. This is helpful especially at year-end since AEF often has more flexibility with last-minute donations.
- 3** AEF allows advisors to manage their clients' DAF assets at every level, not just above \$250,000 or \$1,000,000. Advisors are able to select the investments and thus provide consistent investment advice to clients. They are not forced to pick from limited number of pooled funds they would not normally use.
- 4** Many advisors proclaim their independence as one of the primary reasons clients should select them; AEF similarly is truly independent and best-in-class. Many advisors prefer to avoid using their own firm's DAF if they do not have confidence in it or if they are unsure of its capabilities.
- 5** Every AEF donor and their advisor is assigned to individual contacts at AEF regardless of the value of the account.
- 6** AEF does not offer its own funds and investments, so it could never compete with wealth advisors or firms that refer clients to AEF.
- 7** AEF DAF accounts are portable, so unlike if a firm switches custodians or the firm that runs the private-label DAF, the donor and advisor can keep the DAF at AEF and fees remain the same or very similar.
- 8** AEF fees are less costly than many other DAF sponsors, especially private-label DAFs.
- 9** 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 grant making, identify grantees, etc. , AEF is able to refer its donors to these firms and in many cases, is able to allow the donor to pay for the services out of their account. Few DAF sponsors offer this program, and some only allow this for donors at the \$1 million level.
- 10** For nearly 25 years, AEF has extensive experience and flexibility in accepting donations of many different types of complex assets and is willing in many cases to hold these assets instead of requiring their immediate sale. AEF will accept donations of real estate and other assets at significantly lower levels than many other DAF sponsors.
- 11** AEF can accommodate international grant making.
- 12** AEF is very efficient in processing grants on a daily basis.