



Benefits of a Donor Advised Fund

Donor Advised Funds are the fastest growing charitable giving vehicle in the country, providing individuals and organizations with a highly effective and customizable tool for creating a charitable giving legacy. Capstone Legacy Foundation provides donors with tailored services to make their giving as enjoyable and effective as possible.

1. Receive an immediate tax deduction

Receive the federal income tax deduction up to the fullest extent allowed by law

2. Contribute a wide range of assets -

Contribute cash, stocks, bonds, mutual funds, privately held securities, S-Corps, LLCs, real property, in-kind gifts, insurance policies, and testamentary gifts.

3. Name your fund

Create your charitable identity by naming your fund after your family, company, in memory of someone, for a specific mission, or even call it a foundation.

4. Low cost giving

Maximize your giving impact by investing in a fund that is streamlined for the modern giver.

5. Focus on giving, not administration

Capstone administers your fund, provides gift receipts for your taxes, and seamlessly processes your contributions and grantmaking.

6. Online Donor View

Access your fund online and view your account balance, statements, favorite charities, and grant history, or research charities and make grants whenever you wish.

7. Assets grow tax-free

Invest your contributions with Capstone's leading financial firms, or custody your assets with your own financial advisor.

8. No minimum pay-out requirement

DAFs are not subject to a yearly payout requirement, and you can recommend grants from both income and principal.

9. Next generation giving

Get your family excited about giving by naming them as successors to the fund and making grant decisions together.

10. Complex grant agreements

Let Capstone help you acquire naming rights, make challenge and matching grants, and set up recurring grants.

11. Be recognized or remain anonymous

Create your charitable legacy by determining if you would like to be recognized for each grant personally, as the name of your fund, on behalf of a loved one, or remain anonymous.