Simplify Your Giving

MAXIMIZE YOUR IMPACT WITH A TEMPLE DAF

A donor-advised fund (DAF) is like a charitable savings account that makes purposeful, tax-smart giving simple. DAFs can be funded with cash, appreciated stock or complex assets and provide flexibility in how and when you give—either now for immediate impact or over time for strategic giving. With the new Temple DAF, you can support Temple alongside other charities you care about, all from one streamlined platform using industry-leading technology and with lower administrative fees than traditional DAFs.

WHY SHOULD YOU USE A DAF?

DAFs are quickly becoming the preferred way to give. More than 25% of all charitable dollars now flow through DAFs each year. Given their advantages, it's no surprise.

Donor-advised funds make it easy to

- set aside charitable dollars when it's most tax-advantaged, even if you're still deciding when and how much to give;
- give appreciated complex assets to avoid capital gains taxes, then distribute cash proceeds to any charity;
- put all your giving "in one place" on one tax receipt; and
- invest and grow charitable funds tax-free while they are in an account.

CREATING YOUR TEMPLE DAF

A Temple DAF can be opened with a minimum contribution of $100,000. Donors may establish a fund using cash or many types of appreciated assets, such as stocks, mutual funds, privately held business interests, real estate and others.

Benefits for donors:

- lower administrative fees than traditional DAFs
- immediate charitable income tax deduction
- one convenient vehicle for all your giving
- flexibility to support multiple nonprofits
- streamlined support for complex gifts

HOW YOUR FUND WORKS

- Recommend grants to Temple and other charitable organizations whenever you choose. We ask that at least 50% of your grants be allocated to Temple.
- Use your funds to support your philanthropic interests year after year.
- Make a gift of cash, appreciated securities or other assets to your Temple DAF.
- Choose from a selection of low-cost index funds and other options to invest your philanthropic dollars.

SIMPLE AND CONVENIENT TO USE, WITH MORE IMPACT FOR CHARITIES

- Simplify with one online dashboard—and tax receipt—for all your giving.
- Join others in creative campaigns to raise money for worthy causes through Temple DAF collaborative giving funds.
- Partner with your philanthropic or financial advisor to administer your DAF, including updating your DAF portfolio according to your investment needs.

PARTNERSHIP WITH CHARITYVEST

Temple University has partnered with Foundation Source's Charityvest to offer the Temple DAF as a modern, tech-forward giving experience. Charityvest is a leading DAF sponsor serving individual donors, wealth advisors, nonprofits and workplaces. Contributions to the Temple DAF are irrevocable, tax-deductible gifts to Charityvest, a 501(c)(3) public charity.

GET STARTED WITH THESE SIMPLE STEPS

1. **Claim your donor-advised fund account.** The Temple University Institutional Advancement team will invite you to enroll in the Temple DAF program via email.
2. **Explore your dashboard.** View your balance, create goals for your giving and discover opportunities to give.
3. **Contribute** to your donor-advised fund, either directly on the platform, or with the help of your financial advisor.
4. **Make a grant**, when you're ready, to Temple University or any charity of your choice.

Temple University Institutional Advancement is here to help you explore whether a Temple DAF is right for you. Please contact Tom Yates at 215-926-2545 or tyates@temple.edu.