

Flourish Financially Challenge



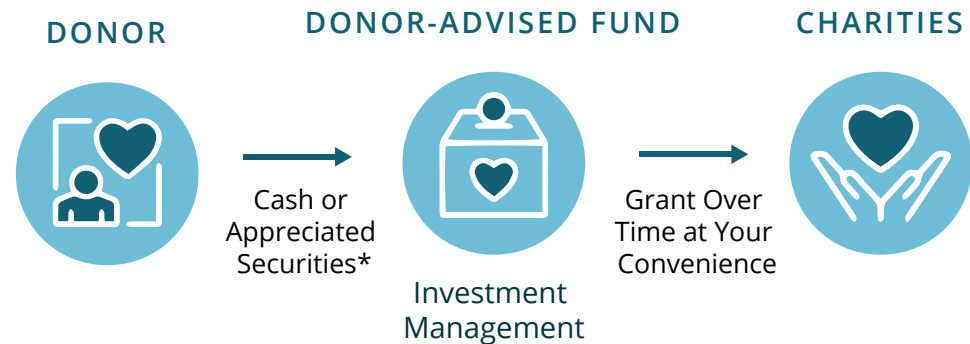
“Alexa, open the Flourish Financially Challenge.”

Donor Advised Funds

Donor-advised funds are an important tool to consider including in your philanthropic efforts. These vehicles provide a flexible way to make a charitable contribution with cash or appreciated securities, take the full tax deduction at the time of the gift, and then easily make ongoing charitable contributions to the organizations of your choice. Donor-advised funds can be established at many large national organizations such as Charles Schwab, Fidelity, or Vanguard.

In addition, there may be opportunities to create a donor-advised fund with a charitable organization in your community that aligns with your giving goals (I use **Women’s Foundation of Minnesota**, for example, because my family supports their goal to create a world of equal opportunity for women and girls).

WWW.FLOURISHFINANCIALLYCHALLENGE.COM



BENEFITS: Capital gains tax avoidance and income tax deduction

PROCESS

- Donate assets
- Receive immediate tax benefits
- Recommend investments
- Make grants to charities
- Plan for a charitable legacy

*Deduction for donated property is fair market value at time of donation. However, if appreciated securities are only held short-term, deduction is limited to cost basis.

