



Any donor. Any gift. Any charity.

# SIMPLE, TAX-SMART, EFFECTIVE Renaissance Charitable Foundation

Did you know **giving by individuals increased again in 2015**? Do you invest their charitable assets? Let Renaissance Charitable Foundation (RCF) enhance your ability to help your clients satisfy their philanthropic goals using a Donor-Advised Fund (DAF).

## INDUSTRY-WIDE NUMBERS

**\$235,727**

Average Account Size

**\$78.64B**

Total Market Value

**\$22.26B**

Annual Contributions at an all-time high

**20.7%**

Grant Payout Rate

### NUMBER OF DAFs<sup>1</sup>



### WHAT ARE DONORS SAYING?<sup>2</sup>

**28%**

Plan to increase their charitable giving in the next 3 years

**31%**

Involve family in charitable giving decisions



## HOW IS RCF UNIQUE?

### All Assets Welcome

Whether cash, mutual funds, stock, real estate, or even closely-held business interests, RCF is able to accept simple and complicated assets to fund your client's DAF.

### Watch it Grow

Since RCF is investment neutral, donors continue working with you, their trusted financial advisor. You manage the assets while we do the legwork on grant recommendations, distributions, and charity research.

### Brain Power

With RCF as your partner, you have access to some of the best and brightest charitable planned giving experts in the country at no cost. Go ahead; try to stump them!

### Three Easy Steps

- 1 Work with your client to complete the DAF application.
- 2 Transfer assets to fund the DAF; Minimum of \$5,000.
- 3 Your client is ready to start making grants.

<sup>1</sup> All averages, Number of DAFs statistics from 2016 Donor-Advised Fund Report, National Philanthropic Trust.

<sup>2</sup> What Donors Are Saying statistics from The 2016 U.S. Trust<sup>®</sup> Study of High Net Worth Philanthropy, Lilly Family School of Philanthropy.

Certain tax events, as well as personal transitions, in your clients' lives offer opportunities to **talk about charitable giving**. Identifying these “trigger” events and the financial considerations associated with them can help you deepen your relationships with clients and be an important resource.

## Starting the Conversation

### Simple, Tax Effective Giving

Would you like to learn how to consolidate your charitable giving while considering your tax planning needs?

A Donor-Advised Fund can simplify year-end giving, allow you to use the most beneficial asset, and lock in the deduction when it is best for you.

### Creating a Legacy of Family Giving

Your family has built a strong philanthropic reputation in your community. Have you considered creating an approach to continue this legacy for future generations?

Utilizing a Donor-Advised Fund allows you to involve your heirs in your charitable giving. It creates a giving tradition for your family to connect as a family on the issues and causes that matter most to you.

### Go Beyond Checkbook Giving

Instead of using already taxed dollars and writing checks to your favorite charities, have you considered donating appreciated securities to a Donor-Advised Fund?

By donating stock to a DAF you may receive a fair market value deduction, avoid paying capital gains, and have more to give to charity.

### Help Reduce Your Tax Burden

Did you have a windfall income event this year and could use a charitable deduction to help reduce your tax burden?

A Donor-Advised Fund creates a way to obtain a current year tax deduction while deferring the distribution of the funds to your chosen charities until a later date.

\*Shares of publically traded, appreciated assets receive a fair market valuation if they have been held longer than a year. If held less than a year the valuation is based on the cost basis. We recommend you conduct periodic account reviews to ensure appropriate levels of liquidity to fund grant requests and perform any necessary rebalancing of the investment portfolios.