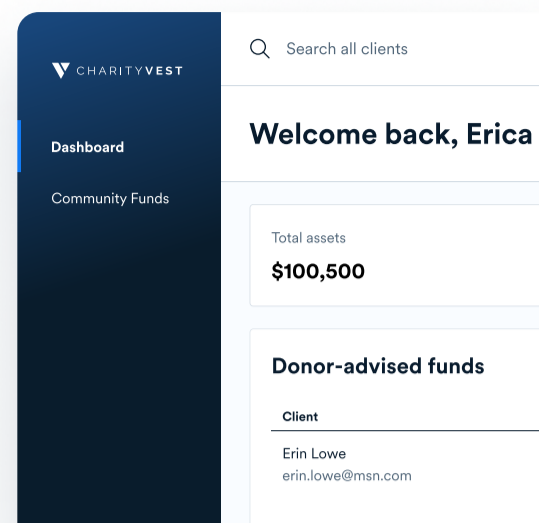


## A tax-advantaged giving account, managed by your advisor

Donor-advised funds (DAFs) are tax-advantaged accounts for giving, like a 401k for charity. They make purposeful, tax-smart giving simple. Your advisor has partnered with Charityvest to provide you access to a world-class DAF experience. They can help you manage your giving from start to finish.



## Why you should use a DAF?

DAFs are quickly becoming the preferred way to give. Over 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:

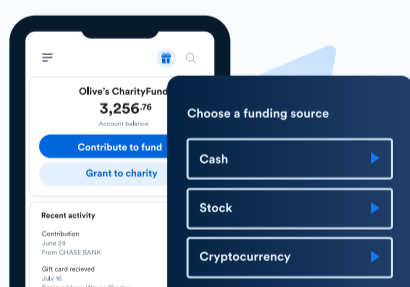
- Set aside charitable dollars when it's most tax-advantaged, even if you don't yet know what charities to support
- Give appreciated assets (to avoid capital gains tax) once, and then distribute cash proceeds to any charity
- Put all your giving on "in one place," on one tax receipt
- Invest & grow charitable funds tax-free while they are in the account

With your donor-advised fund powered by Charityvest, your advisor will be your co-pilot to help you with all of the above. Our modern experience also makes it easy to do simple things, too, like send a grant to charity.

## What makes Charityvest unique?

### Modern DAFs, with your advisor as co-pilot

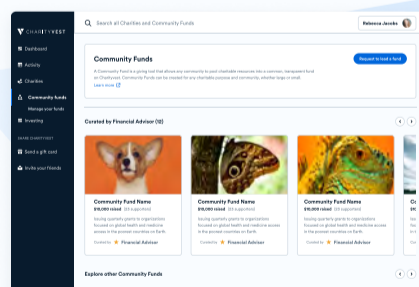
Our DAFs are built with a modern, delightful experience. Your advisor also has full access.



- One dashboard + tax receipt for all your giving
- Contribute cash or assets directly or with help from your advisor
- Support any charity globally
- Much lower admin fees than traditional DAFs

### Collaborative giving funds — join others, create yours

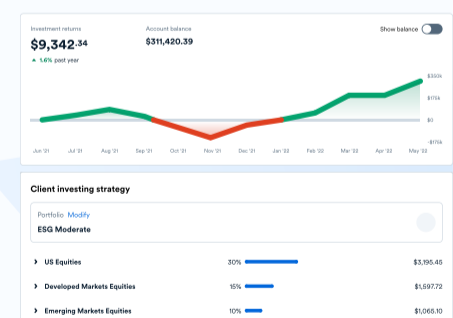
Pool charitable capital with other donors in alignment with your values.



- Search a library of collective giving opportunities, run by passionate participants on Charityvest
- Support existing funds or create your own with the help of your advisor
- Free for everyone, including receiving charities

### Smart investments, led by your advisor

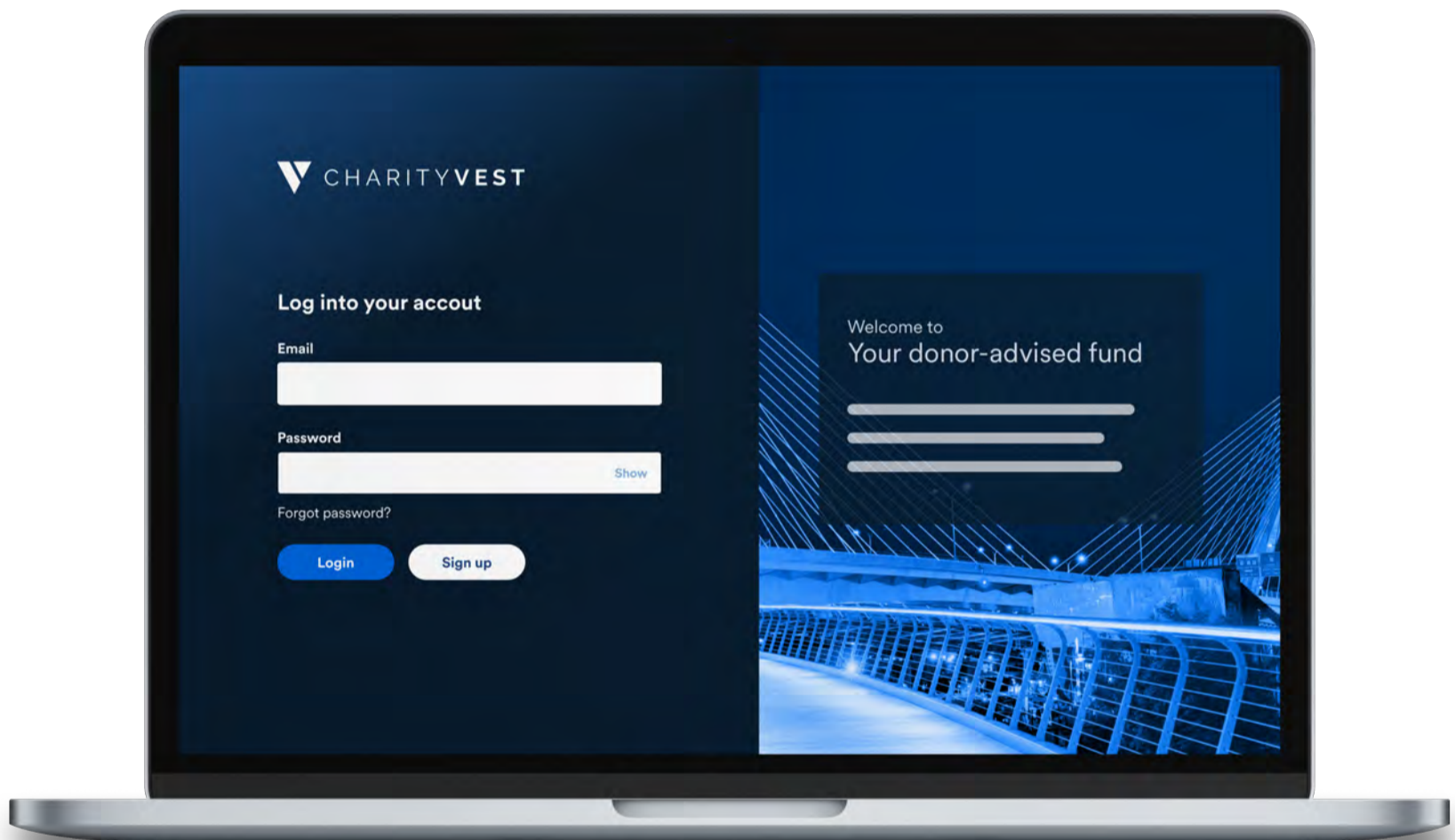
Invest your balance with confidence in a portfolio customized by your advisor.



- Invest your balance in accordance with your financial plan
- Personalize your allocation strategically with help from your advisor
- Work with your advisor to update your portfolio according to your DAF investment needs

## Get started with these simple steps:

- 1. Claim your donor-advised fund account.** Your advisor will invite you to enroll in their DAF program via email. Follow the instructions to complete your account creation. After you create your account, you'll access your DAF via a link provided by your advisor.
- 2. Explore your dashboard.** View your balance, create goals for your giving, and discover opportunities to give.
- 3. Make a contribution** to your donor-advised fund, either directly on the platform, or with the help of your advisor. Your advisor will automatically start investing your funds.
- 4. Make a grant**, when you're ready, to one of your own preferred charities or a Community Fund.



We're here to serve you.

---

### Check out the Charityvest guidebook.

Visit [guide.charityvest.org](https://guide.charityvest.org) for access to the public Charityvest guide. This is a resource available for your advisor's clients and general Charityvest donors. It provides detailed how-to instructions on each aspect of your donor-advised fund experience, powered by Charityvest technology.

**Have questions?** Contact your financial advisor, or if you have questions about the Charityvest platform, you can reach out to Charityvest via email: [support@charityvest.org](mailto:support@charityvest.org).