



## EXAMPLE OF A DAF GIFT

Jane's accountant has advised her that she could use a significant tax deduction this year. She does not want to make such large gifts at one time to the charities she supports regularly and has not decided whether to make gifts to several other organizations she admires.

With a contribution to a DAF, Jane can realize the financial and tax benefits she needs this year but make decisions about supporting her favorite charities, like Guide Dogs for the Blind, when she is ready.

## HOW TO MAKE A DONOR-ADVISED FUND GIFT TO GUIDE DOGS FOR THE BLIND

- If you have a DAF at Fidelity Charitable, Schwab Charitable, or BNY Mellon, you may recommend a grant online at [guidedogs.com/donoradvisedfunds](https://guidedogs.com/donoradvisedfunds)

**OR**

- Contact your DAF sponsoring organization to recommend a grant. Give them the following information:
  - a. Our Legal Name: *Guide Dogs for the Blind, Inc.*
  - b. Our Federal Tax I.D. Number: *94-1196195*
  - c. Mailing Address: *P.O. Box 151200, San Rafael, CA 94915*

**For More Information,  
Please Contact Us:**

[donations@guidedogs.com](mailto:donations@guidedogs.com)  
800.295.4050, ext. 4160

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. © Copyright 2019 by SHARPE newkirk. All Rights Reserved. NXX-19

# GIVING FROM YOUR DONOR- ADVISED FUND



**Guide Dogs for the Blind**

Guide Dogs for the Blind has been honored to receive **donor-advised fund (DAF)** gifts from supporters for many years (for more on how to complete DAF gifts, please see back cover). These gifts have been essential to our work partnering qualified guide dogs with people who are blind or visually impaired.

Gifts from donor-advised funds help us fulfill our life-changing mission and can support specific programs: veterinary care, breeding and neonatal care, puppy naming and volunteer puppy raising, training, orientation and mobility programs, graduation sponsorships, capital building campaigns, youth, and alumni projects.

DAFs can be a great way to give, especially for people who support multiple charities. They are a simple, flexible, tax-wise option.

## HOW A DAF WORKS

1. DAFs are established and administered through community foundations, financial institutions, and through some individual charitable organizations. These are known as “sponsoring organizations.”
2. The donor donates cash, stock, or other assets to the DAF and realizes tax benefits in that year.



3. If the gift asset is other than cash, the sponsoring organization will liquidate it.
4. The donor may recommend grants from the DAF to charities of their choice at a time they choose.
5. The sponsoring organization distributes the grant to the charitable organization.

## DAF BENEFITS

- **Immediate Tax Advantages.** Contributions to DAFs are tax-deductible in the year the gift is made to the fund. If the donor contributes long-term appreciated property, such as securities or real estate, the donor will bypass capital gains tax as well.
- **Flexibility.** DAFs offer donors the ability to separate the decision to make a charitable gift from the decision about which charity to support and when. Donors may contribute assets to the DAF

when it is financially advantageous but recommend grants to their chosen charities later, even in another year. Donors may also recommend gifts to certain charities on a regularly scheduled basis (annually, for example).

## ANOTHER WAY TO GIVE

If you already have a DAF, have you considered what will happen to the funds after you have passed away?

Designating Guide Dogs for the Blind to receive a distribution from a terminating DAF is a wonderful way to make a “bequest” without affecting your other estate plans. You must make this designation (technically, a grant recommendation) through the sponsoring organization. *Because contributions to DAFs are complete charitable gifts in the year they are made, DAF donors no longer own the assets and wills and trusts have no impact on DAFs or any funds that may remain in them.*

If you would like to make a legacy gift to Guide Dogs for the Blind by recommending that GDB receive the remainder of your DAF or a final grant from your DAF, we hope you will let us know so we can thank you for your generosity.