

# LEGACY GIVING



CAF America assists donors looking to leave a charitable legacy by making donor-advised grants and programs funded by their will or estate. Our Donor Advised Fund (DAF) services allow donors to design a philanthropic legacy to include support for charitable programs beyond the standard list of US 501(c)(3) organizations.

## Option 1: Leave a Single Legacy Gift



Donors may name CAF America as a beneficiary of their will or estate, and leave instructions for their Executor to communicate their grant advice once CAF America receives the gift. Under this option, the responsibility to ensure that we follow the correct grant advice rests with the executor.

## Option 2: Build your Legacy with a Donor Advised Fund



Donors may set up a Donor Advised Fund at CAF America and name the Fund as the beneficiary of their will or estate. Establishing a Legacy DAF at CAF America allows donors to more easily design, adapt, and target the impact of their donations.

At the time the Legacy DAF is created, the donor will be able to designate standing grant advice for the use of any donations made into the Fund. The DAF remains inactive until the first contribution is made into it, at which point CAF America will carry out the standing grant advice. This may be initiated during the donor's lifetime or it can begin in the event of their demise. Donors may designate their family members, or any other individuals, as Advisors to the DAF, as part of a legacy plan that engages the next generation in philanthropic giving.

**Legacy DAFs at CAF America streamline the process of giving. Donors have the option to use their Fund to advise grants to both domestic and foreign organizations.**

Donors may choose between four strategies for advising their Legacy DAF. They may advise CAF America to:

1. Disburse the entirety of the Fund to a designated organization
2. Make regular grants from the Fund to a designated organization or group of organizations to create lasting impact through your invested DAF
3. Advise grants to a specific issue area and/or geography
4. Create a unique plan for the grantmaking or investment of the Fund developed in partnership



### QUESTIONS?

Are you interested in building your legacy with CAF America?

Contact us at [info@cafamerica.org](mailto:info@cafamerica.org) or call our office at +1 202 793 2232.