



Global Donor  
Advised Funds

## WEALTH ADVISORY SERVICES



“ GIVE YOUR CHILDREN ENOUGH SO THAT THEY CAN DO ANYTHING THEY WANT  
BUT NOT SO MUCH THAT THEY DO NOTHING. ”

- Warren Buffett

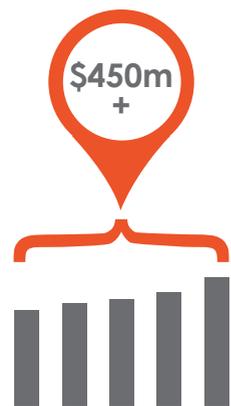


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# 01

## ABOUT CAF AMERICA



Over the past five years we've given more than \$450 million of donor-recommended grants to organizations in more than 100 countries.

### CHARITIES AID FOUNDATION OF AMERICA (CAF AMERICA)

is a global grantmaking organization that serves corporations, foundations, and individuals. CAF America streamlines the grantmaking process to eliminate the risk and administrative burden associated with supporting foreign charities. Through our work, we help donors support the causes they value by enabling them to make strategic, effective, and tax-advantaged gifts internationally and domestically.

CAF America understands that in an increasingly interconnected world, U.S. donors are committed to making a difference. In doing so, they want a choice in how and where they give. We have the ability to direct funds where they are most needed through our vast network of over 1.7 million eligible charities in more than 100 countries around the world.

American donors also want peace of mind in knowing that their support will have a lasting impact. CAF America goes to great lengths to ensure that the organizations it supports meet not only the donors' philanthropic goals, but are in line with the U.S. and foreign rules and regulations impacting international grantmaking. Backed by over 25 years of experience in the field, we provide assurance that charitable donations are used safely and effectively.

CAF America is a U.S. 501(c)(3) Public Charity (EIN: 43-1634280).

# 02

## ABOUT CAF AMERICA



### GLOBAL REACH

CAF America's global reach is supported through its offices in Washington D.C., San Francisco, London, and advisory networks throughout Africa and Asia.

### CAF GLOBAL ALLIANCE

As a member of the CAF Global Alliance, a network of like-minded organizations that spans 6 continents, CAF America offers endless opportunities to deploy your clients' philanthropic funds across the world.

# 03

## OUR PHILOSOPHY



### INTERNATIONAL GIVING CAN BE:

#### SAFE & SECURE

Philanthropists want assurances that their donations are made legally, tax-effectively and are used for the intended purposes. Any concerns U.S. donors may have when giving to domestic causes only become more complex when giving internationally.

Trust CAF America to maintain full regulatory compliance with all domestic, international, and country-specific regulations. We conduct extensive due diligence to ensure that neither you or your clients face any risks and we take all legal responsibility for grants. At CAF America, every action we take is to protect you and your clients' reputation.

#### TAX-EFFECTIVE

As a U.S. 501(c)(3) public charity, gifts to CAF America are tax deductible to the fullest extent of the law. Donors can fulfill their international giving objectives by making their gift to CAF America and then recommending their preferred foreign charitable organization. CAF America navigates the complex U.S. regulations and maintains all fiduciary responsibility for making the grant.

#### STRATEGIC

CAF America helps you develop the best philanthropic strategy for your clients giving. Whether it is transferring complex assets, stocks, or establishing a DAF for long-term giving, our experienced staff and array of services allow your clients to achieve the most impact with their giving. If need be our team can support you in helping your clients decide where and how to give while maintaining the highest level of confidential advisory services.



# 04

## WHAT CAN CAF AMERICA DO FOR YOU?

### COMPLEMENT AND DIFFERENTIATE YOUR PRACTICE:

- Incorporate best-in-class global grantmaking services
- Ensure grantmaking legal compliance with domestic, international, and foreign country regulations
- Provide your clients with opportunities for tax-effective international giving in 100+ countries
- Integrate donor advised funds (DAFs) and other giving solutions into your suite of services
- Allow your clients to give to nearly any organization, CAF America can vet charitable organizations and projects across the world (even those run by businesses!)
- Turn your clients' stocks, bonds, securities, and other illiquid assets (such as real estate or art) into tangible impact while ensuring maximum tax-benefits
- Offer a comprehensive suite of philanthropic services, from vision and strategy creation to program development, implementation, evaluation, and measurement



The percentage of High Net Worth Individuals that gave internationally in 2015.

Source -  
The 2016 U.S. Trust  
Study of High Net  
Worth Philanthropy

# 05

## OUR APPROACH



We understand that effective philanthropy begins with a clear vision and a focused plan for making that vision a reality. CAF America provides unparalleled expertise and personalized solutions to help you bring your clients' philanthropic visions to life.

### CAF AMERICA'S WEALTH ADVISORY PROPOSITION:

- Creates an integrated approach towards philanthropy that incorporates vetting, grantmaking, and other services into your practice's pre-existing offerings.
- Helps you start the conversation with your clients and engage them in philanthropy.
- Ensures that time and dollars are well spent through donor advised giving solutions, expanding the offerings of your practice.
- Allows your clients to transform their illiquid assets into tangible impact.
- Provides peace of mind eliminating all risks to you and your clients, guaranteeing ironclad legal compliance, and protecting your and your clients' reputations.



Join an ever-growing list of organizations and individuals who use CAF America's global vetting and grantmaking solutions.

CAF America can integrate our grantmaking solutions painlessly into any existing giving strategies that you or your clients may prefer. If your clients already have a DAF at an institution such as Fidelity Charitable, Schwab Charitable, or Vanguard Charitable, or at any community foundation, they can use CAF America's international giving solutions while maintaining these pre-existing arrangements.

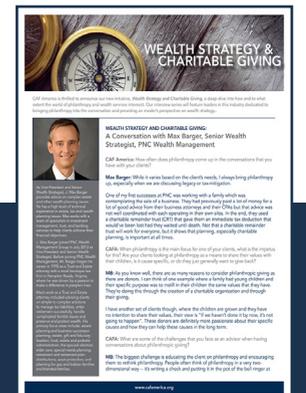
CAF America engages a Wealth Advisor Council to keep us abreast of changes relevant in tax law and estate planning, and has gathered in-depth knowledge about the field through interviews with leading wealth advisors from various specialties.

### CAF AMERICA'S WEALTH ADVISOR COUNCIL MEMBERS:

- J. Max Barger, J.D.** | Senior Wealth Strategist and Vice President | PNC Wealth Management
- Brad Bedingfield** | Counsel | Hemenway & Barnes LLP
- Peter M. Cohen** | Chairman of Trident Trust Company | (South Dakota) Inc.
- Jennifer Murtie** | Chief Operating Officer | Pathstone Federal Street
- Jane Peebles** | Partner and Attorney | Karlin & Peebles, LLP
- Miki Akimoto** | Senior Vice President & Practice Expert | U.S. Trust

# 06

## PARTNERS IN GIVING



### CAF AMERICA'S WEALTH ADVISOR INTERVIEW SERIES

Our interview series features leaders in this industry dedicated to bringing philanthropy into the conversation and providing an insider's perspective on wealth strategy.

Available at [www.cafamerica.org](http://www.cafamerica.org)

# 07

## OUR PRODUCTS



### DONOR ADVISED FUNDS

Donor Advised Funds (DAF) have become the most sought-after way for donors to achieve their philanthropic goals. Opening a DAF at CAF America is an efficient and cost-effective way to conduct both domestic and international grantmaking through a single fund. DAFs eliminate the considerable time and expense required to establish and maintain a Private Foundation.

For donors wishing to grow the impact of their contributions over time, CAF America offers the option of establishing an Invested Donor Advised Fund (IDAF). With the IDAF, you may recommend investment allocations based on your appetite for risk and goals for growth. IDAFs at CAF America enable donors to receive immediate tax benefits while providing the opportunity to contribute even more to their preferred organizations in the future.

CAF America partners with Merrill Lynch Investments to offer our donors access to four research-backed Model Portfolios of Exchange Traded Funds (ETFs). Our investment options are ranked "conservative" to "moderately aggressive" and allow donors to choose a strategy that best fits their philanthropic mission and goals.



# 08

## OUR PRODUCTS

### CAF AMERICAN DONOR FUND (CADF)

#### A smart solution for dual U.S./U.K. taxpayers

The CAF American Donor Fund enables dual taxpayers to claim 'Gift Aid' in the U.K. while still benefiting from a tax deduction in the U.S.

The CAF American Donor Fund allows donors to support the causes they most care about around the world. The only requirements are that the donor has to be paying tax in the U.S. and the U.K., while their earnings must exceed the U.S. foreign-earned income threshold.

### DONOR ADVISED GIFTS

Donor Advised Gifts (DAGs) are the perfect solution for U.S. donors who want to give globally without establishing a Fund at CAF America. DAGs enable U.S. donors, including individuals, foundations, and corporations, to make single donations as desired. With DAGs donors make a single tax-effective gift to CAF America and recommend the foreign charitable organization they wish to support. CAF America can also recommend a charity that fits a donor's interests and philanthropic goals.

# 09

## CASE STUDY



### DONATING ILLIQUID ASSETS (FOREIGN REAL ESTATE)

#### BACKGROUND

A HNWI living in the U.S. wished to donate real estate property in Mexico, valued at \$9 million USD, to a university in Mexico.

#### CHALLENGE

The donation involved three U.S. and two Mexican entities and both countries' governments. Due to strict Mexican regulations forbidding foreigners from owning property in certain areas, there was a complex chain of ownership that created legal and logistical obstacles. Additionally, the property had to be independently appraised by both countries and representatives of the donor and the university. CAF America needed to coordinate among all sides while ensuring that the donation would be legally compliant with the IRS and Mexican authorities.

#### SOLUTION

CAF America's CEO and Board managed the process and coordinated between the donor, university, and the other parties involved. Ultimately, our CEO traveled to Mexico City on December 28th to ensure that the donation was made safely, efficiently, and tax-effectively.



# 10

## DIASPORA

In an increasingly connected world, CAF America is committed to enabling diasporas across the world to donate to their home communities in a safe, easy, and effective manner.

We recognize that all diasporas are unique and within each are hundreds and thousands of unique individuals with their own goals and passions. That is why we are looking to take a flexible approach with the Diaspora Gives Program, which encompasses various philanthropic giving models tailored to fit the needs of various diaspora groups.

Diasporas often give back through informal channels, foregoing a tax-deduction and risking their money falling into the wrong hands. Through donor advised giving, CAF America is able to not only provide diasporans with a tax-deduction, but can ensure that their donations are compliant with relevant regulations, that any risks they have been mitigated, and that their reputation is protected.

#### LEARN ABOUT OUR CORNERSTONE PROJECT



# 11

## OUR TEAM

CAF America's staff are experienced professionals, bringing a wide variety of successful backgrounds in the public and private sectors. Our global community – including staff, board, and advisors – and our service-minded approach are integral components to our success.



**TED HART, ACFRE, CAP®**  
*President and CEO*  
Tedhart@cafamerica.org

Ted Hart, ACFRE, CAP®, President and CEO, CAF America, brings 30+ years of experience in advising global philanthropy. As an internationally recognized speaker, Ted is an expert in both domestic and global philanthropic regulations and risk management. During his tenure as President and CEO, CAF America has witnessed exponential growth, significantly expanded its suite of services and dramatically increased the number of charities funded around the world.

Before joining CAF America, Ted served as President of an international consultancy firm, providing strategic solutions to major nonprofits and NGOs.



**JESSIE KRAFFT**  
*Vice President Donor Advised and Grant Services*  
Jessie@cafamerica.org

Jessie Krafft is the Vice President of Donor Advised & Grant Services at Charities Aid Foundation of America (CAF America), where she has worked for 6+ years. In her current role, Jessie manages a grants team of 20 individuals who are responsible for charity vetting, grantmaking, oversight of IRS regulatory compliance and foreign nonprofit laws, as well as the day-to-day support of thousands of donor clients and international charities. Under her direction, the team works diligently to remain at the forefront on all IRS laws, local foreign country regulations as well as all compliance-related issues in relation to international grantmaking.



**BLAKE BROPHY**  
*Chief Financial Officer*  
Blake@cafamerica.org

Blake Brophy leads CAF America's financial operations and regional finance teams, including CAF America's west coast operations. Prior to joining CAF America, Brophy directed finance and accounting for functions for Arabella Advisors. Holding an MBA from Jones Graduate School of Business at Rice University, Blake began his career in the tax practice of Arthur Andersen LLP servicing a broad array of clients including corporations, partnerships, trusts and high-wealth individuals.



**PAUL KALOMERIS**  
*North America Business Development Director*  
Paul@cafamerica.org

Paul Kalomeris is a seasoned fundraising and development specialist, who has worked with some of America's largest corporations to maximize the impact of their charitable giving. During his 11 year tenure at JK Group, he worked with leading corporations such as Apple, General Electric, Google and Thomson Reuters,

Previously he managed multi-million fundraising campaigns with Fortune 500 companies and public sector agencies for United Way Bay Area. Mr. Kalomeris received his MBA from Santa Clara University. Paul is an avid runner and lives with his wife and two children in Marin County, California.



**KINGA ILE, LL.M.**  
*Vice President of Thought Leadership & Communications*  
Kinga@cafamerica.org

Kinga Ile, LL.M. is a human rights lawyer with more than 15 years of experience with multidisciplinary teams in the private and nonprofit sectors. At CAF America, Kinga has shaped the voice for the organization with the creation of signature initiatives such as the International Grantmaking Symposium and the Diaspora Philanthropy Summit.



**HOWARD ENGLISH**  
*Director of CAF Canada*  
Howard@cafcanada.org

Howard English joins CAF Canada with 25 years of experience as a recognized expert in non-profit governance, communications, donor relations and volunteer development whose work has benefited countless families throughout North America, Israel and beyond.

In part, his success as an executive can be attributed to his success in developing warm, lasting relationships with donors and volunteers. A powerful speaker at local, national and international forums, Howard excels at inspiring even the most unknowing of audiences in articulating the heart of a charity's mission, vision and core values.

# CAF America

## DONOR ADVISED FUNDS

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