



Choosing Triskeles to Manage Your Donor Advised Fund

YOUR CARING LEGACY:

You have an opportunity to make a real difference creating a better tomorrow. Philanthropy (*the love or wisdom of humanity*) means more than writing a check. By creating a Donor Advised Fund (DAF) with a focus on socially responsible/sustainable investing in the Triskeles Foundation, you can ensure that your personal values and motivations, combined with your resources, are put to use in ways that accomplish both your charitable, tax and financial goals.

THE TRISKELES FOUNDATION AND SOCIALLY RESPONSIBLE/SUSTAINABLE INVESTING/GIVING:

1. **Expertise:** About socially responsible/sustainable charitable and investment options as well as specific projects and programs that make a significant, human, social, ecological, economic, and educational difference.
 - ✓ Our managers collectively have over 60 years of social/sustainable investment experience. Our staff has over 30 years of experience with innovative initiation and philanthropic gift deployment.
2. **Relationship Builder:** For socially active donors, the Triskeles Foundation offers a breadth of connections, worldwide, to potential funding partners and to people that, in meaningful ways, build communities and enhance responsibility for the earth's resources.
3. **Commitment:** To philanthropy and the conscious application of investment money to improve society.

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund is a flexible charitable giving vehicle that enables a donor to maximize the tax benefits associated with giving while supporting one's favorite not-for-profit initiatives. A donor opens a Donor Advised Fund with Triskeles by signing a simple agreement and sending an initial deposit, at which time, the tax advantages are realized (to the donor). The donor recommends (to Triskeles) funds to be granted to their favorite, high impact charities thus, supporting the creation of a better world.

- ✓ Minimum: \$5,000 initial gift; \$10,000 (before disbursements can be made); lower minimums for youth
- ✓ No required annual payout
- ✓ Anonymity, if required
- ✓ Ease of grant making and administration
- ✓ No startup costs
- ✓ No excise taxes
- ✓ Deductible up to 50% of adjusted gross income vs. 30% for a private foundation
- ✓ Easily make additional gifts to the fund
- ✓ No estate taxes
- ✓ No capital gains taxes

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YOU NEED A TRISKELES FOUNDATION DONOR ADVISED FUND IF:

- ◆ You may have considered establishing a private foundation (it is much cheaper and more efficient to set up and operate a Donor Advised Fund)
- ◆ You have received an inheritance or other financial windfall and want to make gifts over time, but need a current, year-end tax deduction
- ◆ You want to teach family members about giving over time, using a practical, flexible tool
- ◆ You wish to be actively engaged in social change philanthropy

THE TRISKELES DIFFERENCE:

- ◆ Low fees/costs
- ◆ Low minimum deposit to establish a fund
- ◆ Individualized service catering to your personal interests and approach to socially responsible giving and investing
- ◆ Very personal, flexible service: for individuals; socially/philanthropically oriented businesses; not-for-profits (endowment/reserve fund management)
- ◆ Knowledge and capacity for national and international giving opportunities

WHAT DO YOU RECEIVE FROM THE TRISKELES FOUNDATION?

Gifts to the Triskeles Foundation can be made at any time throughout the donor's life to provide funds for current and long-term needs, projects and activities. By establishing a fund with the Triskeles Foundation, you receive:

- ◆ **Permanence:** The Triskeles Foundation's trusteeship ensures that your contribution will continually meet needs relevant to your interests.
- ◆ **Commemoration/Naming:** Your name or a name that reflects your intentions or something of meaning can live on through your fund. You choose your fund's name. Grants are made using this name or donors may opt for anonymity in their giving.
- ◆ **Innovative Stewardship:** The Triskeles Foundation aligns its investment strategy with your values and mission and therefore, offers an innovative, socially responsible, diversified investment approach to donors. The foundation makes a full accounting of its activities through a variety of reports, its audit, and IRS Form 990.
- ◆ **Future Planned Gifts:** The Triskeles Foundation works with you to articulate your wishes for a gift that would come to us after your lifetime. We accept most planned giving vehicles.

NOTE:

Because the income and transfer-tax consequences of contributions to charity will vary depending upon the personal circumstances of the donor, and the nature of the property contributed, persons considering making a contribution should first consult with their legal and tax advisors. Although great effort has been taken to provide accurate numbers, information and explanations, under no circumstances shall this or any other materials describing the program be intended to constitute legal opinion or advice. Rather, the materials are intended as a basis for further discussion with professional advisors who are charged with responsibility for rendering legal opinions or advice. The Triskeles Foundation and its affiliates receive fees in connection with the operation of the program. Generally, the amount of these fees will vary depending on the investments in the account.