



**Heather Hackett**  
Director of Development

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## Donor-Advised Funds

Give through a Donor-Advised Fund to provide the life-long refuge and exemplary care for rescued chimpanzees.

Manage your charitable giving through a Donor-Advised Fund (DAF). Establishing a DAF is like creating your own personal charitable foundation, but without the administrative work. It's a simple process of depositing the amount you would like to donate into your DAF and then directing those funds at any time to the charity of your choice like Save the Chimps.

### Benefits of this gift

- **Control.** You have advisory privileges over the fund and can recommend distributions to support qualified charitable organizations like Save the Chimps.
- **Tax advantages.** You may claim a federal charitable income tax deduction in each year you contribute to your fund. There is no capital gains tax due on appreciated assets, and the gifts may reduce your gross taxable estate.
- **Setting up a (DAF) will provide you a charitable deduction now and allow you to designate beneficiaries later.**
- **Flexible payouts.** You can distribute funds to Save the Chimps at any time, on your own timetable - no more year-end rush.
- **Simple record-keeping.** Your fund manager handles the administration of your donations, including your receipts and paperwork.
- **You incur none of the legal, administrative, or reporting requirements with a donor advised fund that you do with a private foundation, and the assets in your fund may grow tax-free.**

### How to do this gift

- **Work with a financial institution (such as Fidelity, Schwab, Vanguard) or Community Foundation to create a fund in your name or in the name of a loved one.**
- **You make an irrevocable gift to the fund. Your fund's manager may have a minimum initial gift size of \$5,000 or more.**
- **You receive a charitable tax deduction when you deposit money into the fund.**
- **Recommend distributions from your fund to Save the Chimps and any other charities.**
- **Your Donor-Advised Fund is invested and may grow over time.**
- **Your financial institution administers the fund, writes the checks, and makes the distributions in your fund's name. You receive regular statements from the fund's administrator documenting your distributions, fund balance, and tax deductions.**



## Notify Us!

To ensure you are listed as the donor of record and to let us know to expect your gift, you can email:

[hhackett@savethechimps.org](mailto:hhackett@savethechimps.org)

**For more information or should you have any questions, please contact:**



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[savethechimps.org](http://savethechimps.org)