WEALTH SOLUTIONS GROUP

BAIRD
Private Wealth Management

Donor Advised Funds

A Donor Advised Fund ("DAF") can help simplify charitable giving while potentially providing meaningful tax benefits. Your Baird Financial Advisor can help you evaluate whether a DAF aligns with your charitable and financial goals.

Wealth Solutions Group – Charitable Giving Solutions

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WHAT IS A DONOR-ADVISED FUND?

A Donor-Advised Fund (DAF) is a charitable giving account that provides a **flexible and tax-efficient** way to make contributions to **support charitable organizations that are important to you**.

Once assets are contributed, they become the property of the DAF sponsor and may qualify for an immediate tax deduction. While the DAF sponsor maintains legal control of the assets, you may recommend grants to qualified charitable organizations over time.

DAFs provide many of the benefits of a private foundation but are often less costly and easier to administer.

BENEFITS & CONSIDERATIONS

A DAF can help simplify your charitable giving strategy while providing flexibility in how and when you support charitable organizations.

Potential Benefits	Important Considerations
• Immediate Charitable Tax Deduction • Provides donors with the ability to support charities over time • Family legacy and multigenerational philanthropy opportunities • Ability to donate appreciated securities like stocks or bonds • Charitable assets grow tax-free • More cost-effective than other forms of charitable giving	• Contributions and assets are irrevocable • Once contributed, the Donor is no longer the owner of the assets • Grants must be made for qualified charitable organizations • Advisory privileges are subject to sponsor approval

WHY DOES BAIRD REQUIRE DISCRETIONARY ADVISORY MANAGEMENT?

Because the DAF sponsor is the legal owner of the assets, investments must be managed under a DAF Sponsor-approved framework. Discretionary management in an advisory account allows your Baird Financial Advisor to manage investments in accordance with the account's investment objectives, helping promote diversification, reduce administrative burden, ensure compliance requirements are met, and support the DAF's long-term charitable goals.

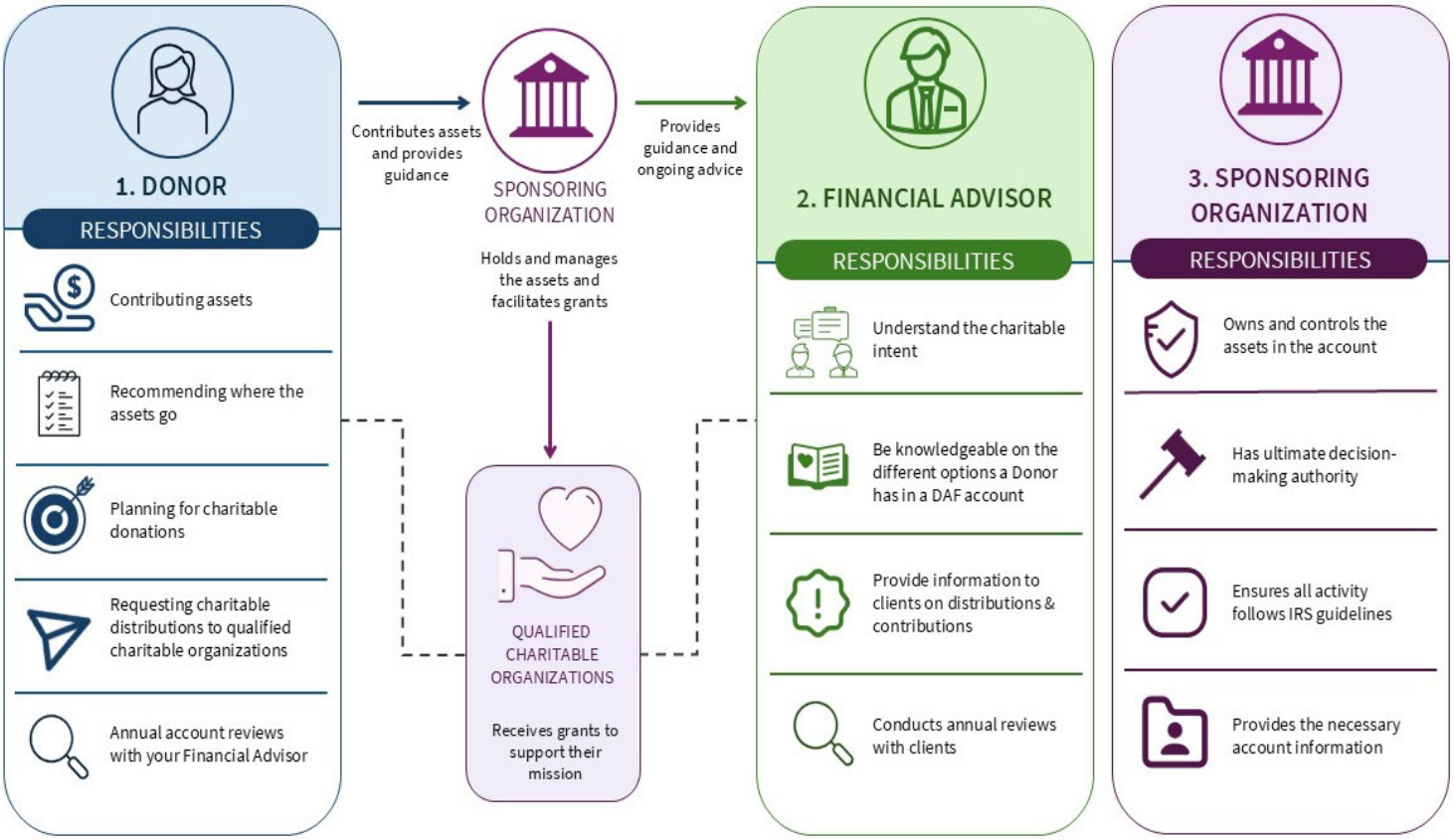
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FREQUENTLY ASKED QUESTIONS

Are there tax benefits?	Can assets remain invested?	Are contributions to DAFs reversible?
Depending on your individual circumstances, a Donor Advised Fund may provide several tax advantages, including an immediate charitable tax deduction, potential capital gains tax savings, tax-free growth of invested assets, and estate planning benefits.	Yes. Assets can remain invested and potentially grow tax-free until grants are recommended to eligible charitable organizations.	No. Contributions to a DAF are irrevocable gifts.

GETTING STARTED

Contact your Baird Financial Advisor to learn more about Baird's partnership with various DAF sponsors.



Donor-Advised Funds (DAFs) are charitable giving vehicles sponsored by a public charity. Contributions are irrevocable and become the property of the DAF sponsor. Donors may recommend grants and investment allocations, but the sponsor retains legal control over the assets and approval of all grants. Tax benefits depend on individual circumstances; consult your tax and legal advisors. Investments may gain or lose value, and past performance does not guarantee future results. Grants may only be made to qualifying charitable organizations.%Investments within a DAF are subject to administrative fees, investment management fees, and potential minimum balance requirements. Please review the sponsoring organization's program guidelines for a detailed fee schedule.

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