



Optimize Giving with a Donor-Advised Fund (DAF)

How does it work?

A donor-advised fund (DAF) is like a charitable investment account that is set up for the sole purpose of supporting charities, including Regis. Individuals can contribute cash, stocks, and other assets into the DAF and receive an immediate tax deduction. Those funds are invested for tax-free growth and you can recommend donations to Regis over time.

What are the benefits?

- Opening a donor-advised fund allows donors to make a gift and qualify for a charitable deduction immediately without needing to decide, until you're ready, on the charities to support with grant recommendations.
- A donor advised fund can also be part of your estate plan: by naming Regis as a beneficiary, you can ensure that when the DAF ceases to have an advisor, the assets are transferred to Regis.
- DAFs also allow donors to bunch charitable gifts in a given tax year to maximize a deduction and then recommend grants at later dates.
- It can also be a way to offset a year with unexpectedly high earnings, or to address the tax implications of year-end bonuses or stock option exercises, or to offset taxable income generated from rebalancing your portfolio.
- Once donated to the DAF, assets can be invested and earn returns without being taxed.
- By donating directly to a DAF, you can potentially give more to Regis than if you were to liquidate assets and then donate.

We encourage you to consult with your financial advisor.

Please contact the Office of Advancement if you have any questions or need assistance: 212-288-1142 or giving@regis.org