

Raymond James Charitable donor advised fund

Create a charitable legacy plan with immediate tax benefits and deductions.

Similar to a private foundation, a donor advised fund lets you donate to your favorite charities and receive immediate tax benefits and deductions, but with less expense and setup.

HOW DOES A DONOR ADVISED FUND WORK?

A donor advised fund administered by the Raymond James Charitable Endowment Fund provides an easy way to make significant charitable gifts with immediate tax benefits and deductions. An agreement is created between you and the Raymond James Charitable Endowment Fund, which gives you the right to advise how portions of the charitable gifts are used.



WHAT ARE THE BENEFITS?

- Easy to set up and requires little administrative maintenance
- No capital gains tax on long-term appreciated assets that are gifted
- Receive immediate tax deduction for full market value of gift* for most assets
- No excise taxes like a private foundation
- Assets donated are no longer part of the estate value
- Makes a difference in people's lives and communities for years to come
- Carries on your legacy

To learn more about establishing a donor advised fund through the Raymond James Charitable Endowment Fund, talk to your Raymond James financial advisor. We recommend you work with your financial advisor alongside your legal and tax professionals to coordinate the most appropriate charitable solution for your situation.

*Any amount that can't be deducted in the current year can be carried over and deducted for up to five succeeding years.

RAYMOND JAMES CHARITABLE
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Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional. Donors are urged to consult their attorneys, accountants or tax advisors with respect to questions relating to the deductibility of various types of contributions to a donor advised fund for federal and state tax purposes. To learn more about the potential risks and benefits of donor advised funds, please contact us. Raymond James Trust N.A. currently serves as the service provider for Raymond James Charitable, a public charity. Raymond James Trust is affiliated with Raymond James & Associates, Inc., and Raymond James Financial Services, Inc. Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value. © 2022 Raymond James Financial Services, Inc., member FINRA/SIPC. © 2022 Raymond James & Associates, Inc., member New York Stock Exchange/SIPC 22-RJTRUST-40310-1025 8/22