



Serving Your Clients with Donor Advised Funds

A donor advised fund (DAF) with The Signatry is your tool for strategically engaging your clients in conversation, planning, and supporting values through generosity. This tool can yield both tax savings for your clients and a more intentional way to be generous with all of their resources for the causes they love. DAFs become a way for you to connect with your clients on deeper levels and serve them with the charitable strategies they are looking for.

Benefits

Differentiate Your Practice

DAFs and charitable giving strategies are an innovative way for you to gain a competitive edge by diversifying your offerings for clients.

Unlock Tax Savings

Using both cash and complex assets, DAFs can help you provide increased tax savings for clients. Tax planning is more effective and efficient, with one contribution receipt at tax time for clients' giving.

Grow Relationships

Connecting to the causes your clients care about allows you to grow more meaningful relationships. DAFs can help engage your clients and their children in building lasting legacies, which allows your practice to extend across generations.

Planning with DAFs

Family Meetings

When it comes to generosity, families desire clarity and intentionality. You can bring your clients and their families together to discuss the values they share and help them build a giving plan for the future through a DAF.

Charitable Bunching

For clients looking to maximize their tax deductions through bunching contributions into one year, the DAF is an excellent tool that can be used to hold charitable contributions and distribute funds over the course of years.

Estate Plans

Use a DAF to plan long-term giving in your clients' estate plans and discuss the causes that matter most to them. Naming a DAF as a beneficiary provides clients a way to continue charitable giving even after their passing and involve next generations in generosity.

Charitable giving is not at odds with your practice—it is an advantage.

Your clients rely on your expertise to guide their financial journeys. That is why DAFs with The Signatry are designed for financial advisors. We care about equipping you to have the conversations that matter most and offering the best tools for your clients. As you help facilitate greater generosity, you are building bridges into the next generation and helping create lasting impact.

Ready to get started? Contact us at 913-310-0279 or info@thesignatry.com to learn more.