

Problem: Looking for a tax-effective way to donate to your favorite charity?

Solution: Open a Donor Advised Fund through Fidelity

Steps to take:

1. Navigate to fidelitycharitable.org/open-account.html
2. Click “Open Now”.
3. Complete all account holder information and click Next.
4. Complete account information and click Next.
5. Confirm and Submit.

Benefits:

- No minimum contribution to open an account
- Long-term appreciating assets can be purchased within the account after the initial deposit. These investments have the ability to grow tax-free in the account, making each donation more meaningful
- All contributions are tax deductible the year they are made (even has the ability to exceed standard deduction)
- No capital gains tax is incurred when funds (stocks) are transferred into the Donor Advised Fund, and the entire value can be used as an itemized deduction on your tax return
- Once the account is funded, contributions can be made at any time, and for any amount
- All donations from your Donor Advised Fund can be automated

There is NO Charge for us to be the ‘advisor’ on this account and assist you if you ever need help.

**To learn more about Endowment Wealth Management
and our Fee-Only Fiduciary Advice:**

**Call: (920) 785-6010
Visit: www.EndowmentWM.com**

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