ENDOWMENT
WEALTH MANAGEMENT®
Fee-Only Fiduciary Advisors

EWM Personal Finance Tips & Solutions

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
- Depending on the sponsoring organization, contributed assets may be allocated among available investment options. These investments have the ability to grow tax-free in the account, making each donation more meaningful
- Eligible contributions are tax deductible the year they are made (Some taxpayers may find that charitable giving strategies increase itemized deductions. Tax results depend on individual circumstances).
- Contributions of certain appreciated long-term assets may allow donors to avoid recognizing capital gains that otherwise could have been incurred upon sale. Subject to IRS rules and limitations, eligible donors may also qualify for a charitable deduction based on the value of the contributed asset.
- 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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