

Leave your Charitable Legacy with a Private Family Foundation

Problem: How can I control my charitable legacy?

Solution: Consider a Private Family Foundation through Foundation Source!

What is a Private Family Foundation?

A Private Foundation is a private organization established by a family to pool and distribute funds for philanthropic purposes in accordance with their mission and values. This is accessible through your computer.

Funding Minimum:	\$250,000
Distribution:	Must distribute at least 5% of their assets annually, based on previous year's net average assets.
Legal:	A distinct legal entity, usually established as a nonprofit organization under state and federal laws.
Control:	Direct control over the grants made by the foundation.
Privacy:	Grants are subject to public disclosure, offering less privacy.
Manage:	All administrative duties such as compliance, accounting and oversight may be outsourced to the sponsoring organization.
Grants:	Computerized, you control all grants with no restrictions.
Legacy:	Can establish endowments to ensure their philanthropic efforts have a long-lasting impact across multiple generations.

(continued on the other side)

What are the Main Benefits?

Immediate Tax Deduction:

- Certain charitable contributions may qualify for an income-tax deduction, subject to IRS rules, valuation requirements, and applicable deduction limitations.
- Proactively plan when to itemize deductions to maximize the tax benefits from your donations.

Tax-Free Growth:

- Donated funds may be invested and receive tax-free growth for a greater long-term impact.

Estate Tax Benefits:

- May reduce your estate taxes by removing appreciable assets from your taxable estate.

Tax Strategies:

- Contributing appreciated assets to charitable entities may, under certain circumstances, allow donors to avoid recognizing capital gains that would otherwise arise from a sale.
- "Bunching" donations to receive a tax benefit. Maximizing your tax deductions is often achieved by itemizing deductions every 1, 2, or 3 years. You receive no tax benefit if you use a standard deduction.

**Tax treatment depends on individual circumstances and applicable tax law*

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

Call: (920) 785-6010

Visit: www.EndowmentWM.com

Disclosures: Information contained herein is intended for informational, illustrative and/or educational use only and not designed to be a recommendation for any specific investment product, strategy, plan feature or other purpose nor shall it be construed to be the provision of individualized investment, tax or legal advice. Endowment Wealth Management, Inc. ("EWM") is not soliciting or recommending any action based on this material. This is neither an offer nor a solicitation to buy/or sell securities in any state or jurisdiction where EWM is not registered, or notice filed and does not qualify for an exemption from such registration and notice filing requirements. Prior to making any investment or financial decisions, an investor should seek individualized advice from a personal financial, legal, tax and other professional advisors that consider all of the particular facts and circumstances of the investor's own situation. All investments involve risk and potential loss of capital and, unless otherwise stated, are not insured or guaranteed. EWM is not a tax advisor. You should consult with a tax professional with respect to tax implications of private family foundations.

While the content herein has been obtained from sources that we consider reliable, we do not represent that the information is accurate, complete, or current and it may be relied upon as such. Reliance upon any information in this material is at the sole discretion of the reader. Content is subject to change without notice.

The potential benefits, limitations, costs, tax consequences, and suitability of any charitable-giving strategy depend on an individual's unique circumstances and applicable laws. Before taking any action, individuals should consult with their financial advisor, attorney, tax professional, and other qualified advisors regarding their specific situation.

Endowment Wealth Management, Inc. ("EWM") is registered as an investment adviser with the SEC. Registration does not imply a certain level of skill or training. A copy of EWM's disclosure documents, including Form ADV Part 3 (Client Relationship Summary), Form ADV Brochure Part 2, and Privacy Statement, are available upon request.