

INCLUDE A DONOR ADVISED FUND IN YOUR ESTATE PLAN

with the San Francisco Foundation

Your estate plan is an important and powerful tool that can be used to provide for both your loved ones and your favorite charitable organizations after your lifetime. A Donor Advised Fund (DAF) is a vehicle that can help you easily integrate your philanthropy into your estate plan. This fact sheet summarizes how to name your existing DAF at the San Francisco Foundation – [or create a new one](#) – to achieve your goals.

BENEFITS

Tax-Efficient Giving

Where a gift to your fund made during your lifetime is eligible for an immediate income tax deduction, a bequest to your DAF is eligible for an estate tax charitable deduction and may reduce your overall estate tax.

Not all assets are taxed equally. We encourage you to consult with your professional advisors to determine the most tax-efficient ways to give to both family and to your DAF at the SFF.

Flexible Planning

By naming your DAF as a beneficiary, you can rest assured knowing that if your charitable goals ever change, you can complete the Disposition of Assets form without needing to incur the costs often related to revising your estate plan.

You can name specific charities, or you can select specific issue areas. As a community foundation, our expertise in Bay Area grantmaking means that we have in-depth information about organizations that are working hard to make the Bay Area a region where everyone thrives, and we can distribute funds on your behalf, based on your interests.

Including the Next Generation

Some donors want to provide charitable funds for their families to carry on their philanthropic legacy. By allocating a bequest to your DAF, your gift and any remaining assets in your DAF are made available to your fund's successor advisor(s) for grantmaking. You can also set up a plan for multiple funds to be created after your lifetime, so that family members can each advise their own charitable funds.

PLANNING OPTIONS

- Name loved ones as successor advisors for your existing DAF
- Set up a plan to create a new DAF for each loved one, funded after your lifetime
- Name charitable beneficiaries or identify issue areas to receive any remaining DAF assets
- Create an endowed fund using any remaining DAF assets that will provide annual support to specific charities or issue areas
- Create a plan with any combination of the options listed above

You can select an option now and easily update it easily later.



SAMPLE BEQUEST LANGUAGE

The suggested language below is provided for your attorney to incorporate into your will or trust:

I give [description of property] to the San Francisco Foundation (Federal Tax Identification Number 01-0679337), a community foundation primarily serving the San Francisco Bay Area, California, for the [name of your donor advised fund], a donor advised fund of the San Francisco Foundation.

Please contact us for personalized language or to develop a customized bequest plan.

THANK YOU

If you have included the San Francisco Foundation in your estate plans, please notify us by completing the [Future Gift Intention Form](#).

By including the foundation in your estate plans, you are automatically eligible to join the foundation's Bay Area Promise Society. The foundation hosts special events for Bay Area Promise Society members, including presentations by local financial and philanthropic experts, site visits to learn more about the work of local nonprofit organizations, and opportunities to hear what donor peers are doing with their philanthropic pursuits. Additionally, Bay Area Promise Society members are a part of the San Francisco Foundation family and receive the benefits enjoyed by all foundation donors, including customized financial and philanthropic advice.



Group of Partnership for the Bay's Future 2020 challenge grant recipients. [Partnership for the Bay's Future](#) is a public-private partnership that works with community and faith-based leaders, housing experts, elected officials, and residents with the goal of protecting people already living in affordable homes, and preserving and producing affordable homes to meet the region's housing needs.



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