

# CREATING YOUR LEGACY

Enhancing the giving experience

ACGFUND





## Giving can be more than the gift

THE ADVISORS CHARITABLE GIFT FUND HELPS MAKE GIVING A WAY OF LIFE.

Giving is an important part of your life. You find supporting worthy charities rewarding and you take the responsibility seriously. You want to make a difference, both now and into the future.

But there's more for you in giving than just the gift. Your financial support is an expression of what you care about—of what you believe in. Giving is a vital part of your legacy.

As a donor to the advised fund, the Advisors Charitable Gift Fund (ACGFund) offers you a unique opportunity to make the most of your giving—to make it a memorable and satisfying experience.



## Your guiding hand in giving

Because ACGFund is an Internal Revenue Service Code (IRS) authorized public charity, your irrevocable contributions to the fund of cash, securities or other assets are immediately tax deductible to the fullest extent provided by law.

- You can make recommendations for grants to charitable organizations whenever you deem appropriate.
- You can also recommend how your contribution will be allocated among ACGFund's investment options.
- Your gifts may grow, benefiting from the fund's professional management.

- To further enhance your personal participation in creating a giving legacy, you may designate a successor who will make grant and investment recommendations should you no longer be able to do so. That way, your legacy can continue through your lifetime and that of the next generation.
- Your irrevocable gift can be funded through a charitable trust. Working with ACGFund, you can name a specific non-profit to receive future grants and/or create one or more Donor Accounts. With a Donor Account, you appoint a successor who will make grant and investment recommendations well into the future.

As you can see, the Advisors Charitable Gift Fund helps make giving a way of life.

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Guiding giving far  
into the

# future

Charitable organizations need and appreciate all types of gifts. But donors who want to create a legacy of giving find what they are looking for in ACGFund:

- You can plan your giving far into the future.
- You and your successors can advise ACGFund on the investment of your contributions.
- Your personal and family values are respected—and perpetuated. If for some reason, you no longer feel

aligned with the mission of a beneficiary, you can change it. In this way, you can be certain that your legacy is honored.

- You have the opportunity to make giving a family experience, should you decide this is important to you. Some ACGFund donors hold periodic “family meetings” to discuss their giving and making grants. They find this to be an effective way to pass along their giving values to future generations.



Enhancing the  
giving

# experience

ACGFund was established as an effective way for individuals, trusts, estates and corporations to enhance the giving experience for themselves, their heirs and the charitable organizations they support.

ACGFund's vision of effective philanthropy pools contributions to enhance efficiency and reduce operating costs. Its investment options are selected for positive outcomes and low cost.

At the same time, donors have their own accounts that reflect contributions

and the results of investment and grant activities. ACGFund makes it easy to open and add to your accounts, and make grants whenever you wish.

Since financial advisors are often key to the planning of gifts, ACGFund offers investment advisors access, should a donor wish, to a donor's account. This assists the donor in planning future contributions as well as obtaining advice on current investment options.

## A UNIQUE DONOR ADVISED FUND

While there are a number of donor advised funds available, ACGFund is a truly independent option. It is not related to a mutual fund, broker or bank. Its directors are free to select from the universe of investment options to maximize its donors' legacies.

ACGFund exists to simplify your charitable giving. This is important to you as a donor. You and those close to you get to recommend which charities benefit from your grants.

Since ACGFund is not associated with a particular charitable organization, you can advise the fund to make grants to any approved public charity.

ANSWERING  
YOUR QUESTIONS  
AND OPENING AN  
ACCOUNT

You are invited  
to contact:

**Michelle Gerardi**  
ext: 5038

**Marc Farrand**  
ext: 5049

**Kenneth G.Y. Grant**  
ext: 5017  
at 877-677-2243

Or visit  
[www.acgfund.org](http://www.acgfund.org).

There is no  
obligation and  
we welcome the  
opportunity to  
answer your  
questions and  
provide detailed  
information.



**Advisors  
Charitable  
Gift Fund**



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