

Ardmore United Methodist Church

200 Argyle Rd, Ardmore, PA 19003

Office - 610-649-4382

aumeth@verizon.net / www.ardmorechurch.com

Rev. Timothy Thomson-Hohl, Pastor

610.306.3709 (cell) - thomhaht@aol.com

Rev. Donald R. Williams, Pastor Emeritus

Donor Advised Charitable Funds

Donor Advised Funds are excellent modalities to fulfill philanthropic objectives. They are in a way your own "mini foundation" which gives you the ability to direct grants to your favorite charities.

The donor gets an immediate tax deduction for the full funding amount. In addition, donations grow tax free for as long as the account is in existence and additional tax deductible contributions may be made at any time.

They may be funded with cash or appreciated securities which offers additional tax savings. Since this is a donor advised fund, your donation is invested in accordance with your wishes. Usually, this involves mutual funds. In addition, the donor selects the charity as well as the amount and timing of the gift.

These charitable funds enable you to "Leave a Legacy of Giving." they afford you the opportunity to:

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- craft a giving legacy that reflects your charitable mission and wishes.
- grant money to your favorite charities according to your wishes
- pass your account on to your loved ones so that they might continue the charitable legacy which you established.

There are at least three prominent Mutual Fund companies with a dedicated organization devoted to philanthropic causes:

- Vanguard Charitable: 888-383-4483 [Minimum initial funding amount \$25,000]
- T Rowe Price Program for Charitable Giving: 800-690-0438 [Minimum \$10,000]
- Fidelity Charitable: 800-262-6039 [Minimum \$5,000]

These non-profit organizations have a dedicated staff prepared to help set up a Donor Advised Charitable fund. It may be done by phone or "paper" application and usually takes less than fifteen minutes. You may wish to request materials from all three organizations to learn more about these funds.

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ARDMORE UNITED METHODIST CHURCH PLANNED GIVING INTENT FORM

Date: _____

Name of Donor(s): _____

Address: _____

Phone number: _____

Dear members of the Church Finance Committee,

Please be advised that it is my/our intention to donate \$_____ to The Ardmore United Methodist Church. The funds are currently being held by my/our Donor Advised Charitable Fund at ____--
_____.

I further understand that this represents a pledge which does not legally bind me to fulfill such an obligation.