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LEARN | Tax Advantages of Donor-Advised Funds

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A donor-advised fund (DAF) is a turnkey solution that allows clients to simplify their charitable giving, centralize tax reporting and potentially maximize deductions.

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Did You Know?

An estimated 90% of tax filers use the standard deduction, which increased with the 2017 Tax Cuts and Jobs Act (Note: many tax benefits/provisions, including the higher standard deduction, are set to expire in 2025). Due to the higher deduction amount, fewer people are benefiting from itemized deductions.*



Key Takeaway

For clients whose itemized deductions no longer exceed the standard deduction, a DAF provides an opportunity to recover a tax deduction and continue to support their preferred charities.

Explore the Tax Advantages of DAFs

Select a topic to learn more about the different tax benefits of DAFs.

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Next Step

Talk to your clients about their charitable intentions to determine if a DAF can help maximize those intentions as well as tax deductions.

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*Source: *Berry-Johnson, Janet. "The IRS Is Supersizing Standard Deductions For 2023. Is That Good for Your Taxes?" Forbes, accessed February, 23, 2023.

Examples provided are for illustrative and informational purposes only and not intended to be reflective of results you can expect to achieve.

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