



## DONOR-ADVISED FUNDS

A donor-advised fund at KBFUS is a flexible tool for individuals, families and corporate donors wishing to support nonprofit organizations in Europe or Africa on a regular basis. Donors can contribute to their fund whenever it suits them, claim an immediate tax deduction, and recommend grants to their favorite nonprofits at a later date.

### A FLEXIBLE SOLUTION

- Name your fund as you wish, and open it with a first contribution of any size.
- Make additional tax-deductible contributions by check or wire transfer, in any amount.
- Donate appreciated stock or other assets, or from an existing donor-advised fund or family foundation.
- Rest assured that grant moneys are used for legitimate charitable purposes, with our solid vetting process.
- Benefit from secure grant payments via wire transfer - at no extra charge.
- Receive a monthly overview of contributions received, grants made, and available balance.

### OPTIONAL FEATURES

- Invite friends and relatives to contribute to your fund.
- Share your dedicated, customizable webpage to receive donations by credit card.
- Grow fund assets tax-free through investments, with guidance from our Investment Committee.
- Transfer remaining assets at death to a legacy fund, for continued support to a favorite cause.

### A PERSONAL TOUCH

- Enjoy a dedicated fund manager, for any questions you may have.
- Use our Manhattan convening space for your meetings or events, at no charge.
- Call on us to identify premier nonprofits in the country and field of your interest.

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## FEE STRUCTURE

### Management fee:

(charged on each grant to a nonprofit overseas)

5% of the first \$100,000

2% of the next \$300,000

1% of the next \$300,000

0.5% of any amount over \$700,000

### Investment fee:

(only for funds with invested assets)

70 basis points per year (or 0.7% of invested assets)

**No set-up or legal fees**

**No annual maintenance fees**

**No minimum set-up contribution**

**No minimum balance requirement**

### For further questions:

Give us a call: (212) 713-7660

Send us an email: [info@kbfus.org](mailto:info@kbfus.org)

Visit us: [www.kbfus.org](http://www.kbfus.org)

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