

DONOR ADVISED FUNDS



FLEXIBLE PHILANTHROPY WITH A GLOBAL REACH

A Donor Advised Fund is a flexible tool for individuals, families, and corporate donors seeking to support nonprofit initiatives overseas. Claim an immediate tax deduction when you contribute to your fund and then recommend grants to favorite charities at your convenience. Donors can recommend grants to charities based in Europe and Africa, and with Myriad – the alliance for borderless giving – to nonprofits in Asia and Canada as well. Ask us about further solutions for giving to other parts of the globe.

A FLEXIBLE SOLUTION

- Open a fund at KBFUS with a first contribution of any size
- Make additional tax-deductible contributions via check or wire transfer, or contribute securities
- Donate funds from an existing donor advised fund or private foundation
- Benefit from secure grant payments via wire transfer to overseas charitable recipients
- Rest assured that grant recipients are thoroughly vetted and monitored throughout the process
- Give with confidence knowing that grants will meet U.S. and recipient country compliance
- Understand the results and impact of your grantmaking with end-of-project reporting
- Log into our fund portal to view contributions received, grants made, and available balance

OPTIONAL FEATURES

- Invite friends and relatives to make tax-deductible gifts into your fund
- Grow the assets in your fund through investments, with guidance from our Investment Committee
- Transfer remaining assets to a Legacy Fund for continued support to a favorite cause in perpetuity

A PERSONAL TOUCH

- Enjoy a dedicated account manager to answer any questions you may have
- Call on us to fund premier nonprofits in the country and field of your interest
- Leverage our trusted network of local experts and two decades of giving experience across Europe and Africa, or tap into expertise in other parts of the globe through Myriad - the alliance for borderless giving

FEE STRUCTURE

Management fee:

(charged on each grant to a nonprofit overseas)

5% of the first \$100,000

3% of the next \$400,000

1% of the next \$500,000

0.5% of any amount over \$1 million

Investment fee:

(funds with invested assets, instead of management fee)

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

No set-up fees or annual fees

No minimum balance requirement

For further questions:

Give us a call - (212) 713-7660

Send us an email - info@kbfus.org

Visit us - kbfus.org

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Member of Myriad

the alliance for borderless giving

myriad.org