

# 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 across the globe. Claim an immediate tax deduction when you contribute to your fund and then recommend grants to favorite charities at your convenience. With Myriad - the alliance for borderless giving - donors can recommend grants to charities on six continents.

### 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 identify premier nonprofits in the country and field of your interest
- Leverage our trusted network of local experts and two decades of giving experience, and tap into the expertise of our partners in 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](mailto:info@kbfus.org)

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

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**Member of Myriad**

the alliance for borderless giving

[myriad.org](http://myriad.org)