



GIVING WORKS BEST WHEN BOTH YOUR
CHARITY AND YOU BENEFIT

How one investor made altruism part of his long-term financial plan.

Steven was a lifelong volunteer at a soup kitchen and was very passionate about the great work being done there to improve the quality of life in his community. He knew he would include the charity in his estate plan, but also wanted to give during his lifetime and control when and how much he would give each year.

With the help of his Raymond James financial advisor, Steven set up a donor advised fund through Raymond James Trust. Doing so, he was able to ensure that the soup kitchen would receive regular financial support over many years. Because the fund is a tax-qualified public charity, it provides Steven with immediate and full tax deductions and, at the same time, seeks to increase the value of his original gift through prudent investing. Now, when Steven dons his apron to help serve the hungry in his community, he feels even better knowing he will be impacting lives well into the future.

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*This is a hypothetical illustration and is not intended to reflect any actual outcome.

RAYMOND JAMES® Trust

CREATE A CHARITABLE LEGACY WITH A DONOR ADVISED FUND

A donor advised fund, one of four account types administered by the Raymond James Charitable Endowment Fund, provides an easy way to make significant charitable gifts. Similar to a private foundation, a donor advised fund lets you donate to your favorite charities and receive immediate

tax benefits and deductions, but with less expense and setup. And, the assets you place in the fund remain invested and may increase in value to make your gift even more impactful.



BUILDING YOUR LEGACY WITH RAYMOND JAMES TRUST

The Raymond James Charitable Endowment Fund gives you total control of your charitable giving. Unlike private foundations, there are no startup costs, no tax on the fund's investment income, no individual payout requirement and the fund provides all record keeping services.

The Raymond James Charitable Endowment Fund is administered by Raymond James Trust. With more than 23 years' experience, Raymond James Trust administers trusts exclusively designed for families and individuals to meet personal needs both now and in the future. Choosing a trustee to manage your personal affairs could be one of life's most important decisions. Our experts understand the complexities and nuances of issues related to a broad range of personal and court-created trusts and are committed to serving clients for the long term – throughout their lives and for generations to come.

BENEFITS OF A DONOR ADVISED FUND

- Easy to set up and requires little administrative maintenance
- Eliminates or minimizes capital gains tax on long-term appreciated assets that are gifted
- Receive immediate tax deduction for full market value of gift* for most assets
- No excise taxes like a private foundation
- Assets donated are no longer part of the estate value
- Make a difference in people's lives and communities for years to come
- Carry on your legacy

The Raymond James Trust Advantage

- Tenured and credentialed trust professionals
- Sound financial management through our financial advisor partnerships
- Tailored arrangements to suit the needs of benefit recipients
- Responsive client and affiliate partner service
- The highest standards of fiduciary conduct

Our Services

- Oversight of trust assets
- Accounting and record keeping
- Reporting of trust receipts and disbursements
- Tax reporting
- Performance reports and statements

*Any amount that can't be deducted in the current year can be carried over and deducted for up to five succeeding years.

RAYMOND JAMES[®] *Trust*

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