



## *Donor-Advised Funds – Invest Now, Give Anytime*

**Donor-Advised Funds – Get an immediate tax deduction, allow your assets to build, and donate any amount, any time.**

A donor-advised fund is like a charitable investment account for the sole purpose of supporting charitable organizations you care about. Donor-advised funds are the fastest-growing charitable giving vehicle in the U.S. because they are one of the easiest and most tax-advantageous ways to give to charity.

### **How It Works**

- Establish a donor-advised fund with a third-party investment fund such as Fidelity Charitable, Schwab Charitable, Goldman Sachs Charitable Gift Fund, Vanguard Charitable or BNY Mellon Charitable Gift Fund.
- Make a tax-deductible donation using cash, securities, non-publicly traded assets such as private business interests, or cryptocurrency.
- Receive an immediate charitable income tax deduction.
- A contribution to a donor-advised fund is an irrevocable commitment to charity. The funds cannot be returned to the donor or any other individual or used for any purpose than donating to charities.
- Grow your donor-advised fund, tax-free. The funds can potentially grow over time, making available even more money for charitable giving. Most sponsoring organizations have a variety of investment options which you can use as an investment strategy for your charitable dollars.
- You can donate to any IRS-qualified, 501(c)3 public charity as you wish at any time.

### **Benefits**

- Establish a donor-advised fund at whatever time is most convenient.
- Give yourself the flexibility to plan and adjust your charitable giving.
- Add to your fund at any time and in any amount.

- Use a variety of assets: cash, securities, real estate, privately held stock, or other property.
- Build a significant legacy for the charities you support, including Meher Mount.

### **Tax Advantages**

- Receive an immediate charitable income tax deduction for the contribution to the donor-advised fund.
- Any unused deduction may be carried forward in subsequent tax years.
- Avoid capital gains tax on appreciated assets you have owned for longer than one year.

### **How to Make a Gift *Now* to Meher Mount through a Donor-Advised Fund**

If you don't already have a donor-advised fund, you will need to discuss your options with your advisors and set up a donor-advised fund through a third-party management firm.

If you already have a donor-advised fund, you can make a current cash to Meher Mount now. Here is the information you need to know.

**Legal Name:** Meher Mount Corporation, a non-for-profit 501(c)3 organization

**Address:** 9902 Sulphur Mountain Road, Ojai, CA 93023-9374

**Telephone:** 805-640-0000

**Federal Tax ID:** 77-0236525

**Status:** 501(c)3 non-profit, charitable organization

### **How to Use Donor-Advised Funds for a Planned *Future* Gift**

You can also make a *future* planned gift to Meher Mount from your donor-advised account. Contact your advisor to set up your future legacy gift.

To make a planned gift from your donor-advised fund, here is the information you will need:

**Legal Name:** Meher Mount Corporation

**Address:** 9902 Sulphur Mountain Road, Ojai, CA 93023-9374

**Telephone:** 805-640-0000

**Federal Tax ID:** 77-0236525

**Status:** 501(c)3 non-profit, charitable organization

**Designation:** Meher Mount General Fund or the Agnes Baron Endowment for Meher Mount

### **Consult Your Personal Advisors**

The information provided above is **not** to be construed as tax or legal advice and could change as tax laws change. You are advised to consult with your legal advisor, tax advisor, or professional estate planner to determine which options are best suited to your individual situation.

### **Share Your Plans to Ensure Your Legacy**

If you have already included Meher Mount in your plans (or intend to), please let us know. Meher Mount can provide you and your advisor(s) with any needed information. Understanding your intentions will help Meher Mount make sure your gift is used exactly as you wish. And we would also like to personally acknowledge your thoughtfulness and generosity.

### **Questions or Need More Information?**

Conversations with Meher Mount's planned giving team are always confidential and never imply an obligation. Robert Turnage, Treasurer for Meher Mount, will respond and provide the information you requested.

- Call: Robert Turnage, Treasurer: 916-837-3907
- Email: [robert.turnage@sbcglobal.net](mailto:robert.turnage@sbcglobal.net)