

Building YOUR Philanthropic Legacy

WITH WESLEYAN IMPACT PARTNERS

Philanthropic planning is a wonderful way to share your story. As the story of the people, places, ideas, and values that shaped you, philanthropy can be a bridge connecting your past, present, and envisioned future.

Over our 55+ year history, Wesleyan Impact Partners has walked alongside donors, focused on one key question: How can we help you achieve your part in bringing about the world God imagines?

To help you answer this question, our philanthropy team will begin by learning more about your charitable interests, the charities you currently support, and how that support can be maximized into the future. Our gift planning team will also share our many relationships with impact ministries and nonprofits that potentially align with your vision and values.

A Donor-Advised Fund (DAF), described in detail here, is a popular tool for implementing charitable gifts and might provide a tax-saving strategy for creating the impact you dream of through charities that most closely embody your story and reflect your values. Your DAF can be invested in the market, grow tax-free, and be the philanthropic bridge to share your values with your children and grandchildren.

Please contact Wesleyan Impact Partners to start a conversation and discuss how a DAF can help you accomplish your charitable goals today and extend your legacy for generations to come.

Justin Gould
Chief Philanthropy Officer



This information is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.

For more information on gift planning, please contact:



Justin Gould

Chief Philanthropy Officer

P (512) 583-1940

E j.gould@wesleyanimpactpartners.org



**WESLEYAN
IMPACT
PARTNERS**
IGNITING IMAGINATION

www.wesleyanimpactpartners.org

CREATING A Giving LEGACY

DONOR-ADVISED FUNDS



HOW DONOR-ADVISED FUNDS WORK

A TAX-DEDUCTIBLE GIFT FUNDS YOUR PHILANTHROPY

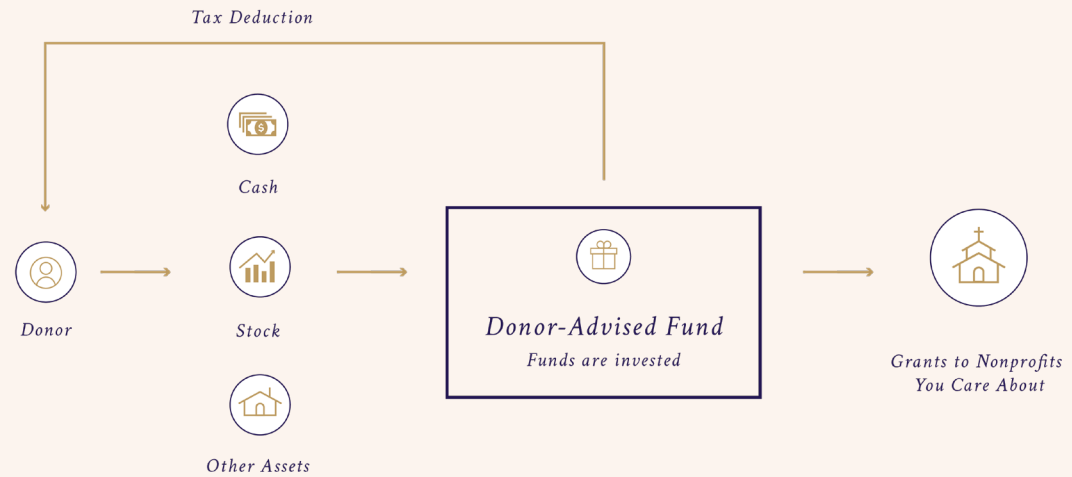
A Donor-Advised Fund (DAF) is a charitable gift vehicle administered by Wesleyan Impact Partners.

You create a simple fund agreement with Wesleyan Impact Partners and then contribute cash, stock, or other assets to your fund to support causes and organizations you care about. You receive an immediate charitable tax deduction when you make contributions to your DAF. The minimum to establish a fund is \$10,000.

SUPPORT YOUR FAVORITE CHARITIES WITH ONE GIFT

Benefits of a DAF:

- Flexibility to support your current giving priorities
- Annual charitable tax information for your records
- Tax-free growth for your charitable giving
- Research and insight into causes you want to support
- Grants can be made in your name or anonymously



GROWING YOUR FUND

You may recommend, from Wesleyan Impact Partners' available offerings, how your gift is invested.

Wesleyan Impact Partners offers a menu of competitive investment options that appeal to a growing range of donors seeking to amplify their giving power through a portfolio of investments managed by Wespath Institutional Investments. Depending on your time horizon, you may select from one or a combination of the following:

- Wesleyan Impact Partners Impact Certificates
- Wesleyan Impact Partners Balanced Fund
- Wesleyan Impact Partners U.S. Equity Fund
- Wesleyan Impact Partners International Equity Fund
- Wesleyan Impact Partners Fixed Income Fund
- Wesleyan Impact Partners Inflation Protection Fund

YOUR GENEROSITY MATTERS

Wesleyan Impact Partners can help you create a plan to give now and in the future.

A member of our philanthropy team would be happy to speak with you in confidence to share how a DAF can support your philanthropic goals. We look forward to working with you and your advisors to ensure that your charitable gift will become an enduring and meaningful legacy for years to come.

If you have questions about Donor-Advised Funds or other ways to leave a lasting legacy, please contact us.

Give us a call at (512) 583-1940.