

iGiftFund vs. Other Donor Advised Fund Sponsors

Comparison of Distinguishing Features



DONOR EXPERIENCE - iGiftFund provides personal service, customized to the individual needs of its Donors, at a level of personalization not found in the industry.

ACCESS - Donors and their financial advisors can contact our principals directly. iGiftFund does not operate a call center.

FUND SIZE - iGiftFund has no minimum fund size to qualify for a separately managed account. A financial advisor can manage a fund's assets at *all levels*, in open architecture.

INDEPENDENCE - With no pools or products to sell, iGiftFund can be totally independent and focus entirely on the philanthropic interests of its donors. It also enables us to offer a uniquely personalized experience that you simply won't find anywhere else.

FEES - iGiftFund's Administrative Fees are *significantly less* than other sponsors in the industry. Donors can experience savings from 25% to 50% *or more*, depending on the fee schedule of the existing sponsor.

DAF EXPERIENCE - iGiftFund has the longest experience in the industry.

FUND OPTIONS - In addition to Donor Advised Funds, iGiftFund offers a variety of donor fund options that can be tailored to donor's needs:

- ▶ Designated Funds
- ▶ Charitable Endowment Funds
- ▶ Field-of-Interest Funds
- ▶ Scholarship Funds

These funds are eligible to receive tax-free qualified charitable distributions that count towards the donor's RMD. The donor's FA can manage investments in these funds.

SYSTEMS - iGiftFund partners with nationally recognized Stellar Technology Solutions, LLC, the most advanced donor system in the industry. Some sponsors are using technology that was installed decades ago.