

Presents

**Private Foundations and Donor Advised Funds:
A Comparison of These Two Philanthropic Heavyweights**



Thurs., September 24, 2020

via Zoom

10:00 am to 11:15 am

10:00 am Presentation

11:00 am Q&A

Presented by Casey Hale

Philanthropically-minded clients are often advised to consider establishing a charitable vehicle as a part of their overall estate or wealth-management plan. By default, many advisors recommend a donor advised fund (“DAF”) as the preferred charitable vehicle. While a DAF is a great option for some, a private foundation offers benefits that may make it a better option in many circumstances. This webinar will cover the advantages and the disadvantages of each type of charitable entity to help you better understand whether a private foundation, a DAF, or both will best help your clients achieve their philanthropic goals. You will learn:

- The differences between private foundations and donor-advised funds
- How a private foundation can be used together with a DAF
- Operational parameters of each type of charitable entity

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