



The George Washington University Donor Advised Fund, a fund within the BNY Mellon Charitable Gift Fund<sup>SM</sup> (“Gift Fund”), offers a simple and tax-efficient way to maximize the impact of your charitable giving. Contributions may be eligible for a tax deduction and grow tax-free, leveraging the value of your philanthropy.<sup>1</sup> Grants are distributed at your own pace, providing the opportunity to develop a strategic approach that better supports your philanthropic vision.

## HOW IT WORKS

### 1 Contribute

Make irrevocable gifts of cash, securities, or complex assets to the George Washington University Donor Advised Fund, with an even split into two accounts<sup>2</sup>:

- *Discretionary Account*: Grant to eligible charities (including the George Washington University)
- *The George Washington University Only Account*: Grant to the George Washington University only

### 2 Invest

#### Invest

Recommend the investment strategy that best fits your giving plans.<sup>3</sup>

### 3 Grant

#### Grant

Research charities and make grant recommendations online.

Track grant and gift history, change investment options, view statements, and manage your account online.

## WHY CHOOSE THE GEORGE WASHINGTON UNIVERSITY DONOR ADVISED FUND

<b>Simple</b>	<ul style="list-style-type: none"><li>– Easy to establish</li><li>– Offers robust online capabilities</li><li>– Streamlines tax documentation</li></ul>	<b>Flexible</b>	<ul style="list-style-type: none"><li>– Offers a variety of investment options, including ESG &amp; index strategies</li><li>– Accepts complex assets</li><li>– Allows committed support to the George Washington University and other non-profit organizations</li></ul>
<b>Tax Efficient</b>	<ul style="list-style-type: none"><li>– Gifts may be eligible for income tax deduction</li><li>– Gifts of appreciated securities can offset capital gains taxes</li><li>– Assets grow tax-free</li></ul>	<b>Impactful</b>	<ul style="list-style-type: none"><li>– Helps secure your legacy with the George Washington University</li><li>– Integrates philanthropy into financial planning and objectives</li><li>– Enables you to share family values with future generations</li></ul>

<sup>1</sup> The BNY Mellon Charitable Gift Fund is a public charity as described in the Sections 501(c)(3), 509(a)(1), and 170 (b)(1)(A)(vi) of the Internal Revenue Code of 1986 (“the Code”), as amended, and is eligible to receive tax-deductible charitable contributions under Section 170(c).

<sup>2</sup> The split percentages may be negotiated with The George Washington University upon the donor’s request.

<sup>3</sup> Administration and investment management for the Gift Fund and its underlying accounts are provided through service agreements with BNY Mellon, N.A. BNY Mellon, N.A. makes available investment products to the Gift Fund that are sponsored, distributed, or provided by companies that are affiliates of BNY Mellon, N.A.

## THE GEORGE WASHINGTON UNIVERSITY DONOR ADVISED FUND DETAILS

Contribute	Grant
<ul style="list-style-type: none"><li>– Minimum Initial Contribution: \$10,000</li><li>– Minimum Additional Contributions: \$250</li></ul>	<ul style="list-style-type: none"><li>– Minimum Grant: \$250</li><li>– Maximum Grant: Unlimited (up to account balance)</li><li>– Anonymous Grants: Yes</li></ul>

Invest		
Traditional Strategies	ESG Investment Strategies	Index Based Strategies
<ul style="list-style-type: none"><li>– Cash Reserve</li><li>– Maximum Income</li><li>– Income</li><li>– Growth &amp; Income</li><li>– Growth</li><li>– Aggressive Growth</li></ul>	<p>These pools invest in managers that consider environmental, social, and governance (ESG) issues in their investment process</p> <ul style="list-style-type: none"><li>– ESG Maximum Income</li><li>– ESG Income</li><li>– ESG Growth &amp; Income</li><li>– ESG Growth</li><li>– ESG Aggressive Growth</li></ul>	<ul style="list-style-type: none"><li>– Cash Reserve</li><li>– Large Cap Stock Index</li><li>– Small/Mid Cap Stock Index</li><li>– International Stock Index</li><li>– U.S. Core Bond Index</li></ul>

*For a Discretionary Account or the George Washington University Only Account with assets greater than \$3 million, individual security models can be selected to align with philanthropic objectives.*

## HOW TO GET STARTED

Before participating in the George Washington University Donor Advised Fund, you should consult with your personal tax or legal advisor.

Information about opening an account is available at <https://bnymelloncharitablegiftfund.org/gwu> or by contacting the George Washington University Office of Planned Giving at 877-498-7590 or [pgiving1@gwu.edu](mailto:pgiving1@gwu.edu).

## ABOUT THE BNY MELLON CHARITABLE GIFT FUND

The Gift Fund was established in 2013 to provide donors with a structured means to express their philanthropic values and priorities to family members and the community. Since that time, the Gift Fund has distributed more than \$100 million to over 3,000 charities.

**CALL** 888.213.7605

**EMAIL** [bnymelloncharitable@bnymellon.com](mailto:bnymelloncharitable@bnymellon.com)

**VISIT** <https://bnymelloncharitablegiftfund.org/gwu>

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### **bnymelloncharitable.org**

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