

# The AEF Difference

**AEF expands philanthropy by partnering with firms and advisors in the financial services industry. This enables more donors to create a significant charitable impact.**

What makes us unique? AEF partners with firms and financial advisors in an **unbiased manner to expand philanthropic giving through donor-advised funds**. We work with donors through their financial advisors to establish and administer AEF donor-advised fund accounts to increase the amount granted to our donors' causes and charities.

This approach affords us the ability to be laser-focused on what we do best: deliver a best-in-class client experience.

## WHY AEF FOR A DONOR-ADVISED FUND?

**Donate** AEF is a 501(c)(3) public charity. You receive a tax benefit when you donate to AEF. Donor-advised funds can accept everything from cash and publicly traded securities to more sophisticated illiquid and alternative assets. Donors receive a charitable gift acknowledgement when they contribute to an AEF donor-advised fund account.

**Invest** AEF partners with firms and advisors in an unbiased manner to expand philanthropic giving through donor-advised funds. You can think of a donor-advised fund as a charitable account. Gifted assets are invested by AEF-approved financial advisors recommended by AEF donors. This enables donors to create a significant charitable impact.

**Grant** AEF is an unbiased administrator and does not prohibit grants based on geographic, religious, or other categories. AEF's donors can recommend grants to IRS-qualified public charities. Donors can choose to give to the causes and charities they care deeply about.

**AEF allows successor donor advisors to be named, allowing your charitable legacy to live on generationally.**

## ABOUT AEF

Established in 1993, American Endowment Foundation (AEF) is one of the nation's largest independent donor-advised fund sponsors. AEF is a mission-motivated organization focused on expanding philanthropy led by a people-driven culture that results in a best-in-class client experience.

## WHY USE A DONOR-ADVISED FUND?

### With a donor-advised fund, donors can:

- Quickly and easily set up a donor-advised fund with no setup charges
- Avoid the complexity and expense of more complicated giving vehicles
- Achieve immediate charitable goals and in most cases receive highest available tax benefits
- Simplify charitable giving and record keeping
- Grow most assets tax free
- Initiate legacy conversations
- Engage the next generation in philanthropic conversations
- Fund future giving

## National Impact

From your local community to your alma mater to everything in between, we support donors' favorite causes and charities.

NEARLY  
**\$5B**  
SINCE INCEPTION

**\$1.2B**  
GRANTED IN 2023

**\$4.9M**  
GRANTED EACH  
BUSINESS  
DAY IN 2023

NEARLY  
**32K**  
UNIQUE  
CHARITIES

LET'S MAKE AN  
IMPACT TOGETHER.

# Expanding Philanthropy

AEF BY THE NUMBERS (AS OF DEC. 31, 2023)



NEARLY  
**\$7B**  
IN ASSETS

One of the nation's largest independent donor-advised fund sponsors.



**\$10.8B**  
IN DONATIONS  
SINCE INCEPTION

Delivering best-in-class service and flexibility for your charitable giving.



**14K**  
DONOR-ADVISED  
FUNDS

The most popular and fastest-growing charitable giving vehicle in the country.

## Financial Advisor Centric

A people-driven culture that results in a best-in-class client experience for firms and financial advisors.



NEARLY  
**6K**  
FINANCIAL  
ADVISOR  
PARTNERS



OVER  
**2.5K**  
PARTNERING  
FIRMS

## Areas of Impact

-  Education
-  Religion
-  Community
-  Health
-  Environment
-  Other

