

Charity Fund: How It Works

Most of America's wealth is held in noncash assets—assets like real estate, businesses, and stocks. Among wealthy families, stocks alone make up over 30% of household wealth. Cash represents 6% or less. Yet when fundraising, most nonprofits only ask for cash gifts.

A charity fund with The Signatry allows your donors to support your work easily with stocks, bonds, and other publicly traded securities—not just cash. Donors can give these securities directly to a charity fund. Once the donation is liquidated, your nonprofit can receive cash grants from the fund. The Signatry handles the paperwork, processing, and liquidation, which allows your nonprofit to focus on what it does best: changing lives.



How It Works

1. The donor initiates a gift of stocks, bonds, or other publicly traded securities to a charity fund with The Signatry.
2. The gift is liquidated, and the proceeds are placed into the charity fund at The Signatry.
3. Gifts given to a charity fund are tax deductible as an irrevocable gift to The Signatry.
4. While contributions are held in the charity fund, they can be invested in our biblically responsible investment pools.
5. When your nonprofit is ready to receive the funds, you can recommend a grant to your nonprofit from the fund.

Disclaimer: The Signatry does not provide legal, tax, financial or other professional advice.

You should consult professional advisors concerning the legal, tax, or financial consequences of your charitable activities.

Benefits

- + Since the donor's gift first goes to The Signatry, we take care of the receipting and paperwork for the donors. All that is left for you is to tell them thank you!
- + The donor receives a charitable tax deduction in the year the gift is given, but you can let the gift grow in investments in the charity fund for as long as you like.
- + Unlike donor advised funds, charity funds are approved to receive IRA charitable rollover gifts.
- + A charity fund is free to open and requires no IRS paperwork.



Get in touch with The Signatry today.

Contact The Signatry at 913-308-1999 or nonprofitsuccess@thesignatry.com to find out more about opening a Charity Fund.



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