One-Stop Giving
The Mayo Clinic Donor Advised Fund
Create the Future of Medicine and Other New Possibilities With One Fund

Your financial and charitable goals are a reflection of your commitment to support the future of your loved ones and charitable causes that are important to you, such as transforming health care with Mayo Clinic.

But sometimes it can be difficult to keep track of the organizations you wish to support and the documents required to receive your benefits from charitable gifts. A convenient and easy way to organize your charitable intentions is to create a donor advised fund with Mayo Clinic. Consider it one-stop giving.

**HOW IT WORKS:**

1. You open a donor advised fund by a written agreement with Mayo Clinic and an initial gift of $100,000 or more.

2. You can make tax-deductible contributions to your fund at any time. Your contributions are invested by Mayo Clinic, and you will receive detailed reporting.

3. You recommend grants of various amounts for Mayo Clinic priorities and other charitable organizations.

**YOUR BENEFITS:**

- **Convenience and timing** — Setting up a donor advised fund qualifies you for a federal income tax charitable deduction when you make a gift to the fund — without immediately having to choose the charities you want to support.

- **Simplicity** — You can support Mayo Clinic and your other charitable causes without having to retain records for a number of separate contributions.

- **Family philanthropy** — Families can build a tradition of giving and teach their children the values of philanthropy by involving them in the decisions about which grants to recommend.
Are you considering establishing a private foundation for your family’s philanthropic giving? For these reasons, a donor advised fund (DAF) might be a better option for you and your loved ones:

- Gifts to DAFs are not subject to the lower income tax charitable deduction limits applied to gifts to private foundations.
- A DAF is less complex to create and operate, avoiding the expense in establishing a private foundation and the ongoing administrative costs for added legal and record-keeping requirements.
- If anonymity is important to your family, a DAF allows you to remain anonymous to the charities receiving your distribution.

**CONTACT US**
Do you currently have a private foundation that is no longer working for your family? We would be happy to discuss how a Mayo Clinic Donor Advised Fund can help.
Joe and Laura want to give back to Mayo Clinic by putting their money where it will do the most good. They establish a $100,000 donor advised fund at Mayo Clinic, where the money can be used to support Mayo Clinic’s research and care, as well as other charities. The couple receives a federal income tax charitable deduction for the amount of the gift.

After researching a variety of charities, Joe and Laura recommend grants for Mayo Clinic research, the local library and an animal shelter. As the fund administrator, Mayo Clinic presents the charities with checks from the Vernon Fund, which Joe and Laura named in honor of Laura’s grandfather, who was treated for a rare condition at Mayo Clinic. Joe and Laura are delighted to start this personal legacy of giving.