FOR THE PEOPLE WHO SERVE.™

Donor-Advised Fund Checklist for Advisors

We understand that charitable giving is an important part of a donor's overall financial plan. That's why we have created this checklist for advisors who want to help their clients give from a donor-advised fund (DAF) to the USO.

- Speak with your client about how they might like to designate their gift according to what they are passionate about. Our team can provide a list of initiatives and impact areas that match your client's interests.

- Determine the best way for your client to structure a gift from their DAF. Depending on the size of the gift and the project they would like to support, donors may want to consider a combination of outright gifts and multi-year pledges.

- Ask your client if they would like to make the USO an ultimate beneficiary of their DAF. Doing so will allow them to create their legacy of strengthening America's military service members by keeping them connected to family, home and country, throughout their service to the nation.

- When coordinating a grant to the USO with your client's DAF custodian, please reference the following information:

United Service Organizations, Inc.
ATTN: Office of Planned Giving
2111 Wilson Blvd. Suite 1200
Arlington, VA 22201
Phone: (703) 579-0845
Email: plannedgiving@uso.org
EIN: 13-1610451

We are here to help you and your clients to give with confidence. If you have any questions or need assistance, please do not hesitate to contact us. We look forward to working with you.