

Why Gates/Apollo

-Independence:

GA is a neutral platform for Donor Advised Funds, tools, information and investments to enable donors and professional advisors to design and conduct their charitable activities as effectively and efficiently as possible. AEF is the only leading Donor Advised Fund program to offer this level of independence and personalized charitable management.

-Contribution Flexibility:

GA Donor Advised Funds can accept and hold a wide array of assets.

-Investment Choice and True Independence:

GA's unique independence provides greater flexibility in investment options free of conflicts of interest that may arise from a firm's proprietary products. AEF can be used from your preferred investment platforms.

-Flexible Investment Management:

You may recommend an independent investment advisor to manage the assets in your Donor Advised Funds.

-Greater Reach:

You can expand your grant recommendations to help charities throughout the country, in addition to your local community and take advantage of the Gates Foundation giving machine.

The GA Donor Advised Fund program was specifically designed to enhance opportunities for large giving. The problems of effective giving at a large scale are unique. They include a scarcity of experience at the big giving level. Charities are rarely set up to accept very large donations. Though over 500 billion in wealth was transferred to only the Forbes 400 last year alone. There are few charities that are capable of dealing with even a 1 billion dollar gift.

The privilege of being able to give away serious wealth is burdened by the lack of creative new ideas and expertise of the smaller charitable organizations. Benefits include:

-Immediate and maximum tax benefits, timed on an individual basis. Because GA is a public charity, contributions immediately qualify for all the maximum tax benefits. [\(see Tax Benefits\)](#)

-You will be able to recommend grants to charities across the nation, and even internationally in some instances, on your own flexible timetable.

-You will join Bill and share his giving and investment experience.

-You will enjoy tax-free growth, which means more dollars for charitable purposes, managed by the country's top investment professionals. Investments in the GA Fund obviously grow tax free to support more giving in the future. The GA Donor Advised Fund would let you structure your giving over time, enabling you to leverage the impact of your grants to worthwhile causes. You would be given the opportunity and flexibility of joining/partnering with Bill in one of his already established 27 silos of giving...at the same time deciding on privacy or enhanced recognition as one of Bill's select partners in philanthropy.

-Privacy. As charitable giving can be quite personal, you may prefer a buffer between yourself and charity seekers. GA enables you to select recognition or privacy as desired (i.e.: privacy in contributing assets, privacy in grant-making and even anonymous grant-making)

-Simple and effective fund management. You can research charities online, sit with the Gates experts and/or recommend grants online, track giving over time and consolidate your tax reporting.

-Create a lasting legacy of giving. Donors would have access to Bill's unprecedented scope and experience in the world of his giving. He has committed his future time to philanthropy and would hold private or small group meetings to explore new ideas.