

Brighton  
Jones®

CASCADE PBS WEBINAR

# Donor Advised Funds 101

*A thoughtful approach to strategic giving*

---

Presented by Brighton Jones

*In Partnership with Cascade PBS*

INTRODUCTIONS

# Meet Your Presenters



**Ellie Silesky**

Impact Advisor

---

Brighton Jones



**Jackie Prideaux, CFP®**

Lead Advisor

---

Brighton Jones

ABOUT US

# Brighton Jones

OUR MISSION

*Help our clients, colleagues, and global community live richer lives by aligning their resources with their values and passions.*

2000

Founded in Seattle

24

National Offices

5,000+

Clients Served

\$30B+

Assets Under Advisement



**Certified B Corporation**

Business as a force for good

OUR IMPACT COMMITMENT

# Proudly Purpose Driven



**Volunteering**  
Teammates in Action



**#OTK**  
One Team for Kenya



**B Corp**  
Certified Community



**Global Impact**  
Causes We Champion

THE LANDSCAPE

# Why are we talking about DAFs?

**\$592.5B**

Total U.S. charitable giving in 2024

**\$64.9B**

Giving from DAFs in 2024

**\$4,500–\$5,000**

Average grant from a DAF

**\$124T**

Expected wealth transfer by 2048

**\$18T**

Projected toward philanthropy

## FOUNDATIONS

# DAF Basics

### **What is a DAF?**

A charitable giving account that lets you contribute, invest, and grant over time.

### **Financial & Tax Benefits**

Immediate tax deduction on contribution; assets grow tax-free until granted.

### **Privacy & Anonymity**

Grants can be made anonymously, offering discretion to donors and their families.

### **DAF Restrictions**

No grants to individuals, political campaigns, or in exchange for personal benefit.

### **Contributions**

Fund with cash, appreciated securities, real estate, or other complex assets.

## THE CASE FOR DAFs

# Why DAFs are a great vehicle for philanthropy

### Intentional & Strategic

Align giving with values and long-term goals.

### Grow Your Impact

Invest contributions and grow tax-free over time.

### Simpler than Foundations

Streamlined setup with minimal administration.

### Added Benefits

Flexibility in timing, asset types, and anonymity.

### Community Impact

Direct dollars where they are most needed.

### A Lasting Legacy

Extend giving across generations and causes.

## OUR APPROACH

# How we support Impactful Giving?

*Partnering at every stage to turn money into meaning.*

### STRATEGY & PURPOSE

- Developing a clear philanthropic strategy
- Identifying causes and nonprofits aligned with client values
- Facilitating conversations with nonprofit leaders
- Multi-generational giving and legacy planning

### LOGISTICS & EXECUTION

- Accountability and execution support
- Establishing and managing DAFs
- Making grants and distributions
- Multi-year gifting strategies and gift agreements

IN ACTION

# Client Stories



TO REMEMBER

# 5 Takeaways from Today

1

Donor-Advised Funds are now a major channel for philanthropy.

2

DAFs are flexible, accessible, and not as complicated as they seem.

3

The greatest impact comes from intentional — not reactive — giving.

4

DAFs can support long-term, family-centered philanthropy.

5

Partnership matters.

LET'S CONTINUE THE CONVERSATION

# Questions?



**Ellie Silesky**

Ellie.Silesky@BrightonJones.com



**Jackie Prideaux**

Jackie.Prideaux@BrightonJones.com



**Scan to  
Connect**



#### **IMPORTANT DISCLOSURE INFORMATION**

The foregoing information is provided for discussion purposes only and should not be relied upon as indicating any expected or projected returns. This information should not be shared, distributed or otherwise disseminated without the express written consent of Brighton Jones, which may be withheld in its sole discretions. Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Brighton Jones) will be profitable. Please remember that it remains the client's responsibility to advise Brighton Jones, in writing, if there are any changes in his/her/their personal financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services. A copy of Brighton Jones' written disclosure statement discussing our advisory services and fees is available for review upon request.

#### **PLEASE NOTE**

Rankings and/or recognition by unaffiliated rating services and/or publications should not be construed by a client or prospective client as a guarantee that he/she/they will experience a certain level of results if Brighton Jones is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of Brighton Jones by any of its clients. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser.