



# Donor Advised Funds (DAF)

If you have a donor-advised fund with a sponsoring charity like a Christian-based fund, community foundation, the National Philanthropic Trust, or the charitable arm of one of the big brokerage firms (Fidelity, Vanguard, Schwab) you can direct the remaining balance in your DAF to support Southwestern Baptist Theological Seminary (SWBTS), rather than let it go to the sponsoring charity.

Over time, you may have made significant gifts to this fund. Upon your death, you have three options:

1. You can designate someone in your family to keep it going,
2. You can allow your funds to go to the sponsoring charity arm,
3. Or you can designate SWBTS to receive the remainder from the fund.

In this day and age, many of these large brokerage houses have little to no connection to Christian values and causes. In fact, you may not be aware that many are supportive of causes opposing traditional Christian and family values. By suggesting that you name SWBTS as the ultimate beneficiary for all or part of an existing DAF and using the change of beneficiary form, you ensure that your stewardship is carried forward in perpetuity.

This gives you a chance to designate your gift for a Christian cause like SWBTS. You can make sure the proceeds of your stewardship go to a purpose you truly support. Additionally, you'll maintain flexibility to change the beneficiary or allow other family members the ability to designate after you have passed away. And because these assets were already designated for charity, your gift will not take anything away from your heirs.

## Contact us for Assistance:

Email: [giving@swbts.edu](mailto:giving@swbts.edu)

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