

Sterling Donor-Advised Fund (DAF)

Our donor-advised fund is focused on **the donor**, to give you the flexibility and simplicity to support your favorite charities according to your preferences.

Donor(s)	Sterling DAF	Preferred Charities
		
<ul style="list-style-type: none"> • Donate assets (cash, stock, LLC/LP interests, etc.) • Gain immediate income tax deduction • Designate successor-advisors 	<ul style="list-style-type: none"> • Sterling works collaboratively with your existing financial and wealth advisors • Investment growth is tax-free • Reduce capital gains on appreciated securities • Non-cash assets not required to be sold 	<ul style="list-style-type: none"> • Donor recommends timing, amount, and charity recipient of grants • Sterling manages due diligence and disbursements

What makes the Sterling DAF unique?

Donor Intent

We will protect your intended legacy by aligning the disbursement of funds to your stated values or preferred causes and charities.

Investment Flexibility

We work collaboratively with your existing financial or wealth advisors, giving you greater flexibility on the management of investments in your Sterling DAF account.

Grant Flexibility

We encourage the support of any charitable cause (religious, educational, scientific, environmental, social, etc.) at any impact level (local, national, or international).

Timing Flexibility

We work with our donors to meet their timing preferences on asset donations and grant disbursements.

Successor Designation

We allow donors to designate as many successor-advisors of the account as they choose until all funds have been disbursed.

Combining Charitable Structures

Sterling is uniquely positioned to offer multiple charitable structures from private foundations, public charities, and charitable remainder trusts. The combination of a Sterling DAF account plus another charitable structure can be a powerful strategy to meet your charitable, financial, or estate planning goals. In addition, Sterling offers the convenience of having your philanthropy managed in one place.

Sterling Donor-Advised Fund

Origins	The Sterling DAF was established as a 501(c)(3) public charity to offer Sterling clients a charitable option in conjunction with other charitable structures or in place of a private foundation.
Mission & Principles	We encourage charitable giving in all forms for any charitable cause to nonprofit organizations (religious, educational, scientific, literary, environmental, etc.) based on donor intent.
Preserve Donor Intent	We work with the donor to create a donor intent statement and other practices so that funds will be used in alignment to the donor values and wishes.
Investment Options	We work collaboratively with a donor's existing financial or wealth advisors giving you greater options, and flexibility over the Sterling DAF account.
Investment Fees	No investment fees.
Initial Setup Fees	No setup fees.
Basic Administrative Services	Sterling applies our private foundation administrative experience to our Sterling DAF in terms of grant due diligence, disbursements, IRS reporting, and regular account status reporting.
Basic Administrative Services Fees	For the first \$1,000,000, fees are the greater of .75% of account asset value or a minimum of \$1,500 annually. A tiered fee schedule applies after the first \$1,000,000.
Advanced Program Services	<p>Advanced Program Services include:</p> <ul style="list-style-type: none"> • Designing a structured philanthropic plan • Identifying and evaluating grantees • Executing site visits • Conducting program research • Brokering special projects • Acting as a liaison between you and grantees • International Grants • Grants to non-charities
Principal Officer	James W. Lintott, Esquire is the co-founder and Chairman of Sterling Foundation Management since its inception in 1998. He has served on the board of private investment and for-profit companies as well as on a number of nationally recognized charities, including the Freer/Sackler Galleries of the Smithsonian Institution, the U.S.- Japan Foundation, Best Buddies International, and Children's National Hospital of Washington DC. He received his J.D. with distinction from Stanford Law, as well as his M.A. in applied economics and his B.A. from Stanford University.