



Reduce your tax burden with a donor-advised fund

Do more with your investments. With Betterment's donor-advised fund provider, it's easy to donate appreciated shares and receive immediate tax benefits. Here's why it might be right for you:

Reduce your taxes

Save on capital gains taxes, and consolidate your donation receipts in one place. Plus, assets in your fund grow tax-free.

Save on fees

Maximize your giving without processing fees. Starting at just \$3/month, you can choose from up to 1.5 million nonprofits, schools, and faith-based organizations.

Set it and forget it

Automate contributions to support your favorite organizations.

Unlike traditional providers, Betterment does not charge AUM-based fees.

The annual cost of a \$50,000 fund:

	Betterment Charitable Giving with Daffy	Fidelity Charitable	Schwab Charitable	Vanguard Charitable
Minimum to open	\$0	\$0	\$0	\$25,000
Annual fees	\$240	\$300	\$300	\$300
Investment fees	0.05%	0.54%	0.65%	0.06%
Total annual cost	\$265	\$570	\$625	\$330
Total savings		+\$305	+\$360	+\$65

Stop donating dollars, start donating shares.
 Get in touch with your financial advisor to learn more.
www.betterment.com/advisors



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