



# The Tigert Fund

(UF's Donor Advised Fund)



## Who is eligible to open an account?

- ▶ Anyone making a gift of \$50,000 or greater.
- ▶ Likely candidates include those experiencing significant taxable events, such as the sale of a business, stock liquidation, or significant real estate parcel, etc.

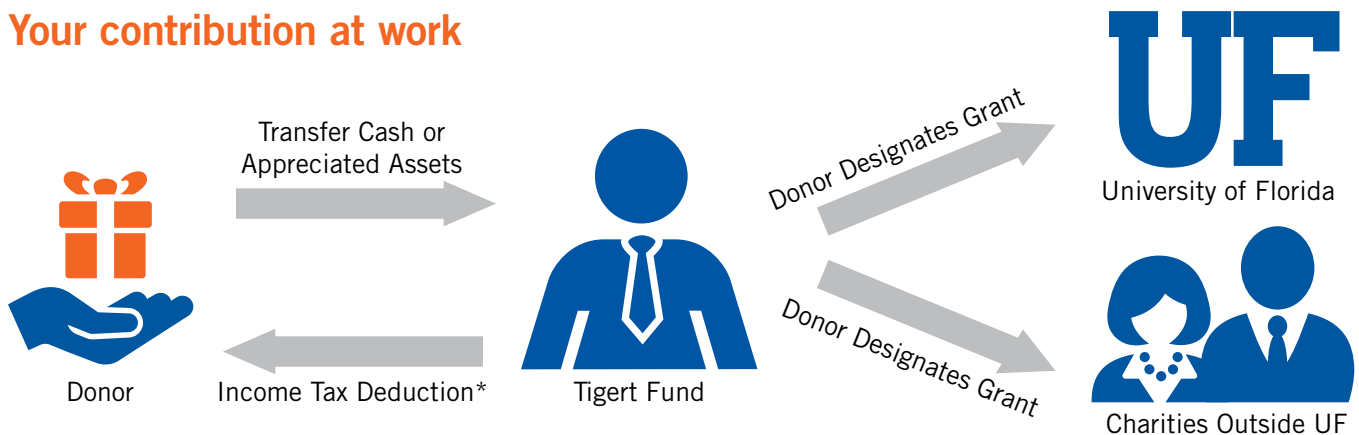
## Major advantages

- ▶ Immediate charitable contribution, deductible subject to normal IRS limitations — without making an immediate decision on the recipients of your philanthropy
- ▶ Support the UF program(s) of your choice, while retaining the flexibility and discretion to support other charitable interests outside UF.
- ▶ The ability to, in effect, operate your own charitable giving fund without incurring the expense of establishing and maintaining a formal foundation
- ▶ No initial set-up fees and low management fees, compared to commercial investment firms
- ▶ The UF Foundation handles all administrative activities for the account.
- ▶ Your investment potentially earns higher returns because it becomes part of a \$1.36+ billion endowment investment pool managed by the University of Florida Investment Corporation (UFICO).

## How it works

- ▶ Donor establishes an account with the UF Foundation with a minimum gift of \$50,000.
- ▶ Donor designates that at least 50 percent of the gift benefits the University of Florida. The remainder is available for giving to charities unrelated to UF, upon the recommendations of the donor to the Tigert Fund committee.
- ▶ All funds are invested through the University of Florida Investment Corporation (UFICO) as part of the UF endowment pool for greatest possible return.
- ▶ The UF Foundation makes disbursements to qualified 501(c)(3) U.S. public charities on behalf of the donor.

## Your contribution at work



## All per your advice

Realize the charitable tax deduction benefits in the first year of your gift, then advise the UF Foundation on charitable contributions you'd like to have made from the balance of your gift to UF. The UF Foundation handles all administrative details for you.

## President Tigert



John Tigert was University of Florida president from 1928 to 1947. In this role, he focused on curricular reform, administrative organization and research support. The undergraduate program was reorganized, and entrance requirements were strengthened. Tigert is credited with creating the General College in 1935 and instituting standardized testing for freshmen and sophomores. The creation of the General College allowed the other colleges to expand the number of upper-level classes. He also helped to rewrite the rules for college football, establishing scholarships for players and assisting in forming the Southeastern Conference.

For more information, contact the University of Florida Foundation. Planned giving professionals will answer all your questions about how to get your Tigert Fund account started and the many ways to tailor advantages to your needs.

*\*The University of Florida Foundation does not provide legal, tax or financial advice. Consequently we urge you to seek the advice of your own legal, tax or financial professionals in connection with gift and planning matters.*

## Contact

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