2022 · SHOULD I USE A DONOR ADVISED FUND (DAF) WHEN GIVING TO PUBLIC CHARITIES?



organization must have

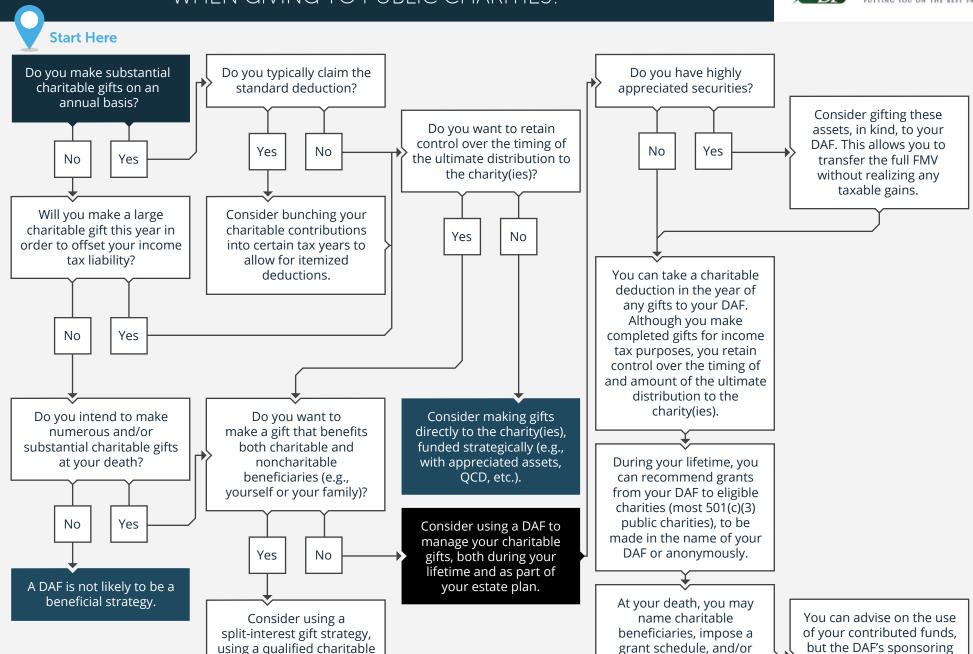
exclusive legal control over

the assets contributed.

name a successor to

assume grant-making

responsibilities.



lead or remainder trust to

accomplish your tax and

legacy planning goals.



Elizabeth L. Whitteberry, RMA®, CFA®, CIPM®, AIF®, ChFC®

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Elizabeth L. Whitteberry specializes in Retirement Income Planning, Tax Minimization Strategies, Wealth Management, Investment Management, Risk Management, Estate Planning, and Gifting Strategies.

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