



## Open a World Vision Donor Advised Fund

Getting started with a new World Vision DAF is quick and easy. **All you need to set up your account are:**

- Your U.S. mailing address
- Your date of birth
- Contact information for each person listed on the account

You can open a new DAF in **four easy steps:**

1. Create an account name and provide your donor advisor information
2. Select investment options
3. Agree to the account terms and conditions
4. Fund the account



World Vision Planned Giving  
34834 Weyerhaeuser Way S.  
P.O. Box 9716  
Federal Way, WA 98063-9716

1-800-426-5753  
[plannedgiving@worldvision.org](mailto:plannedgiving@worldvision.org)  
[worldvision.org/mylegacy](http://worldvision.org/mylegacy)

World Vision is a Christian humanitarian organization dedicated to working with children, families, and their communities worldwide to reach their full potential by tackling the causes of poverty and injustice.



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World Vision 



The World Vision  
Donor Advised Fund

# Make a World of Difference

The World Vision Donor Advised Fund

The new World Vision donor advised fund (DAF) simplifies your charitable giving and helps you manage your contributions to projects and initiatives that bring fullness of life to children worldwide.

## Features of the World Vision DAF

- **Opening minimum contribution:** \$10,000
- **Additional contributions minimum:** \$500
- **Contribution methods:** Check, credit/debit card,\* online check, or securities
- **Minimum grant:** \$250
- **Non-activity reminders:** If you haven't made a distribution in 24 months, World Vision will contact you to ask for grant activity.
- **World Vision support:** 10% of total distributions must be granted to World Vision

## Competitive DAF Pricing\*\*

	Schwab	Fidelity	NEW World Vision
First \$500k	60 bps	60 bps	60 bps (0.60%)
Next \$500k	30 bps	30 bps	30 bps (0.30%)
Next \$1.5M	20 bps	20 bps	20 bps (0.20%)
Next \$2.5M	15 bps	15 bps	15 bps (0.15%)







bps = basis points

\*A 2.5% processing fee applies to gifts made by credit/debit card.

\*\* Pricing collected in April 2020 from sponsoring organization's websites



## The World Vision donor advised fund offers:

-  **Simplicity.** Simple and efficient giving and granting through an online platform.
-  **Transparency.** Investment options and performance at your fingertips.
-  **Flexibility.** View up-to-date electronic statements, recommend grants, and check balances online.
-  **Greater Market Access.** Low opening contribution amount of \$10,000.
-  **Convenience.** Contribute additional funds with a major credit/debit card (a small fee applies).
-  **Choices.** Select your investment options, including VisionFund for impact investing.

## Investment Options

- Money Market Allocation
- Fixed Income Allocation
- Equity Allocation

### Money Market

100%

### All Fixed Income

100%

### Conservative

80%

20%

### Moderate Conservative

60%

40%

### Moderate Growth

40%

60%

### Growth

30%

70%

### Not sure which option is right for you?

Complete our risk questionnaire and read more about each option at [worldvision.org/daf](http://worldvision.org/daf).

## LONG-TERM IMPACT INVESTMENTS

### Microenterprise Development Fund

This exclusive investment opportunity provides financial services to help families and communities break free from the cycle of poverty. By investing in the Microenterprise Development Fund (offered by VisionFund, World Vision's microfinance subsidiary) vulnerable households gain access to credit, savings, and insurance products; and families are empowered to build their businesses and generate their own income. Learn more at [visionfund.org](http://visionfund.org).