



GLOBAL
GIFT FUND



DO YOUR CLIENTS KNOW YOU ARE A CHARITABLE GIVING RESOURCE?

The Global Gift Fund Works

\$14,721,380
Total assets

2x

Total Assets have Doubled since 2010

\$104K
Average Account Size

2014 Results

\$2.66M
in Contributions

550
Grants Awarded



\$1.89M
Totaling
Grants to U.S. Charities

All Assets Welcome

Purchase a new life insurance policy, transfer an existing policy, or use cash, mutual funds, stock, real estate, even closely-held business interest; GGF is able to accept simple and complicated assets to fund your client's DAF.

Investment Neutral

Donors continue working with you, their trusted financial advisor, to manage the assets while GGF does the legwork on grant recommendations, distributions, and charity research.

Brain Power

With RCF as a partner, you have access to the best and brightest charitable planned giving experts in the country at no cost.

Three Easy Steps

- 1 Work with your client to complete the DAF application.
- 2 Transfer assets to fund the DAF; Minimum of \$5,000.
- 3 Your client is ready to start making grants.

You Manage the Assets and Watch it Grow!

Visit our website at www.globalgiftfund.org or call us at (866) 301-0845 for more information.



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Global Gift Fund is a Donor-Advised Fund service in the United States offered by the Renaissance Charitable Foundation, as endorsed by the MDRT Foundation.

Certain tax events, as well as personal transitions, in your clients' lives offer opportunities to **talk about charitable giving**. Identifying these "trigger" events and the financial considerations associated with them can help you deepen your relationships with clients and be an important resource.

STARTING THE CONVERSATION

Simple, Tax Effective Giving

Would you like to learn how to consolidate your charitable giving while considering your tax planning needs?

A Donor-Advised Fund can simplify year-end giving, allow you to use the most beneficial asset, and lock in the deduction when it is best for you.

Creating a Legacy of Family Giving

Your family has built a strong philanthropic reputation in your community. Have you considered creating an approach to continue this legacy for future generations?

Utilizing a Donor-Advised Fund allows you to involve your heirs in your charitable giving. It creates a giving tradition for your family to connect as a family on the issues and causes that matter most to you.

About the MDRT Foundation

The MDRT Foundation is the philanthropic arm of MDRT. Since its formation in 1959, the MDRT Foundation has granted more than USD 28 million to charitable organizations serving people in 67 countries and all 50 U.S. states.

The MDRT Foundation awards grants to charitable organizations that are empowering people in need

in MDRT member communities worldwide. The grants given by the MDRT Foundation are distributed to organizations in which members have a vested interest. Grant recipients have either been endorsed by an MDRT member or receive money in honor of a member's volunteerism.

Fee Schedule:

There is no set-up fee to establish a Global Gift Fund. The investment account application should accompany the Application Agreement. The following account administration fees are charged quarterly to the account (the fee is divided over four quarters).

Balance	Annual Administration Fee (over four quarters)
First \$500,000 (all currency is USD)	Greater of 1.05% or USD 250
Next \$500,000	0.80%
Next \$1,500,000	0.55%
Next \$2,500,000	0.30%
Over \$5,000,000	0.25%

For example: A fund with a balance of USD 750,000 would be charged 1.05% for the first USD 500,000 and then 0.80% for the next USD 250,000.

For more information please contact:

Global Gift Fund 8910 Purdue Rd, Suite 555 Indianapolis, IN 46268 **(866) 301-0845**