

DONOR ADVISED FUNDS AT THE BOSTON FOUNDATION

Why Partner with the Boston Foundation? To Empower Your Clients to Give with Purpose

As a trusted advisor, you're already guiding your clients through some of their most important financial decisions. Helping them shape their philanthropic vision strengthens that relationship and deepens your value as a strategic partner.

Through a Donor Advised Fund (DAF) at the Boston Foundation, you can offer your clients a flexible, mission-aligned vehicle for giving, while remaining at the center of their advisory team. [Learn more about how a DAF at TBF can benefit both you and your clients.](#)



BENEFITS TO ADVISORS

Deepen Your Client Relationships

- Strengthen trust by guiding your clients through meaningful, values-based giving
- Expand your conversations beyond wealth to shaping purpose and legacy

Enhance Your Advisory Offering

- Our philanthropic tools integrate seamlessly with financial, estate, and legacy planning
- Stay at the center of the client relationship — you lead, we support

Deliver Strategic and Tax-Efficient Solutions

- Develop giving strategies that provide clients with significant tax advantages
- Coordinate complex gifts such as appreciated securities or closely held assets

Access a Trusted Philanthropic Partner

- Work together with one of the nation's leading community foundations
- Rely on TBF's philanthropic advisory team for research, vetting, and co-branded resources



**The Boston
Foundation**

Together, we help your clients give with clarity, confidence, and purpose.

To learn more and explore how a Donor Advised Fund at the Boston Foundation could transform your client's philanthropy, please contact Megan Hathaway Foy, Senior Director, Professional Advisor Relations (Megan.Hathaway@tbf.org).