

## Tax-Advantaged Impact Investment Strategies

### ACESO Foundation

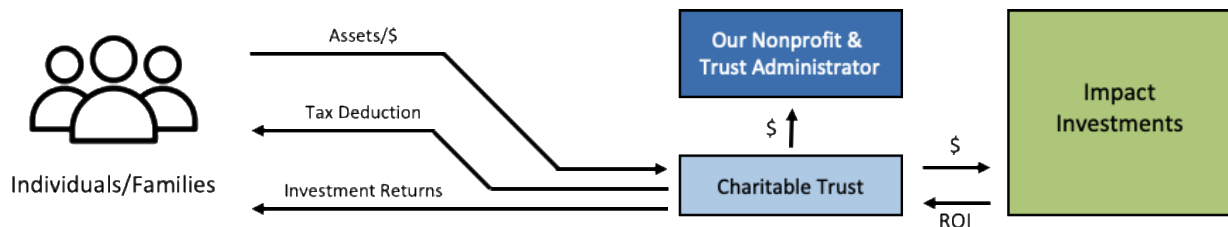
Charitable contributions can be an important part of a financial plan when paired with the right tax-advantaged structures. Our nonprofit offers two advanced impact investment strategies for maximizing tax benefits while increasing your impact.

#### Tax Deduction Optimization Strategy



As part of your tax management plan, a charitable contribution (in the form of cash or a range of assets\*) is made to our nonprofit, and an immediate tax deduction is granted to you for the full value of your donation. Our nonprofit uses the donation to fund select impact investment activities, with financial returns cycling back to our organization enabling future impact investments.

#### Split-Interest Gift Strategy



An additional strategy is to make a charitable contribution (either cash or assets\*) to a specifically designed charitable trust administered by our nonprofit. An immediate tax deduction is granted to you in an amount dictated by tax law and the terms of the trust. The donation is used to fund select impact investment activities, with financial returns cycling back to the trust and then, in part, on to you or your beneficiaries based on the terms of the trust.

*\* Any asset with established or appraisable value may be donated, including real estate, cryptocurrency, stocks, bonds, privately held business interests, and collectible art.*

#### Capital Gains Tax Management

Assets that have accrued in value, and which would normally incur a capital gains tax when sold, may be donated prior to liquidation. Because our nonprofit does not pay taxes, we receive the full value of the asset contributed, which maximizes your tax deduction and the amount that we can invest.

**Let us help you expand your impact investing activities by unlocking the power of charitable contributions as a strategic element of your tax management and investment plans.**

*We are not tax, financial or legal advisors. Please consult with your personal or family advisors to determine how working with our organization might best support your financial plans.*