

UBS Singapore Donor-Advised Fund (DAF)

Philanthropy made simple

We can help you maximise your charitable giving in a simple and cost-effective way.

What is a Donor-Advised Fund?

The UBS Singapore Donor-Advised Fund (DAF) is a personalized and professionally managed giving vehicle without the administrative and financial burden of your own independent foundation.

Set up as a "Sub-Foundation" under UBS Optimus Foundation Singapore, DAF is a platform which allows you to:

- Obtain immediate tax deduction on your full, irrevocable contribution to your dedicated DAF account
- Option to manage your philanthropic funds through investment options[^]
- Recommend donations in line with your philanthropic interests, without any time limit

This offering is available for UBS clients only, with a minimum contribution of USD 50,000.

What are the benefits of a Donor-Advised Fund?

1. Comprehensive solution

- ✓ Immediate tax deduction* on full contribution upon receipt of funds
- ✓ Option to name your "Sub-Foundation" or donate anonymously
- ✓ Due diligence on charities on your behalf

2. Simple and flexible giving

- ✓ All administrative fees are borne by UBS
- ✓ No time limit for donation to charities
- ✓ Donate to all government-approved charitable causes, locally or overseas[#]
- ✓ Tax-deducted* donations can support Singapore charities, including those without Institutions of a Public Character (IPC) status

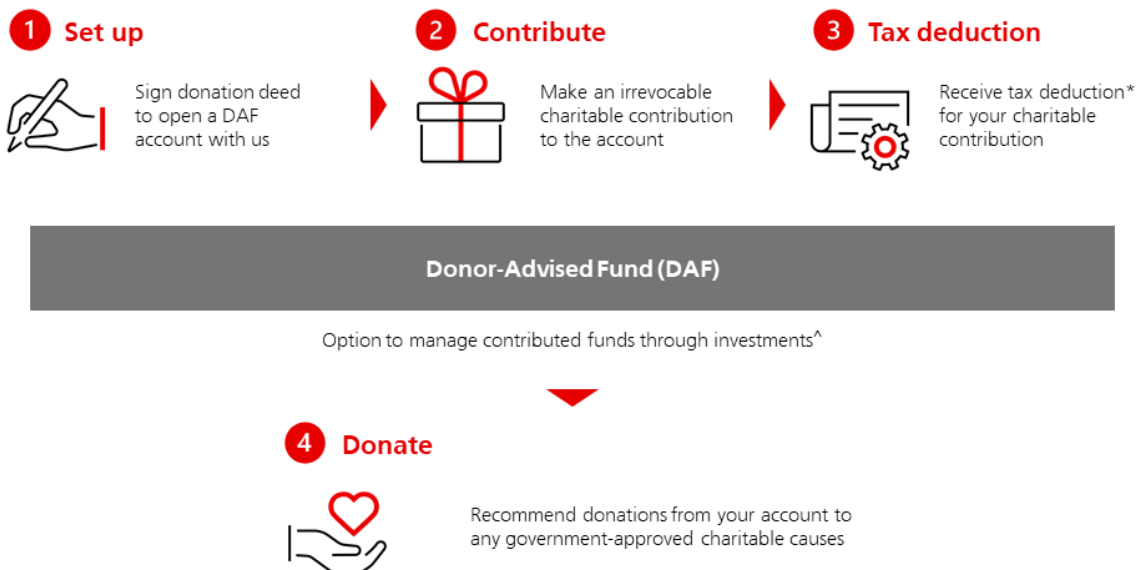
3. Build your legacy

- ✓ Manage contributed funds through investments[^]
- ✓ Option to involve family members and nominate successors
- ✓ Continue beyond your lifetime

Interested in learning more?

To find out more about our DAF offering, please contact your UBS advisor.

How does the Donor-Advised Fund work?



* In accordance to local regulation and tax domicile of donors

Subject to additional due diligence requirements and fees

[^] Investment management fees apply; The price and value of investments and income derived from them can go down as well as up. Capital held in this account is therefore at risk.

UBS Philanthropy Services

UBS Philanthropy Services is a unique, award-winning offering that partners with clients and their families to maximize their philanthropic impact. We provide comprehensive advice, insight experiences, and execution services, and employ an investment-based approach to deliver solutions to pressing social and environmental issues.



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