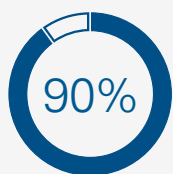


Turn Illiquid Assets into Powerful Gifts

Leveraging illiquid assets in the AssetMark Charitable Donor-Advised Fund (DAF) is a powerful philanthropic and tax-efficient strategy for individuals with significant illiquid wealth. Beyond cash and stocks, they can accept illiquid assets like real estate and private business interests—often a donor’s largest source of wealth, unlocking greater impact and tax advantages.



About 90% of the nation’s wealth is tied up in non-cash assets.¹



Donors can give up to 20% more because of the potential to eliminate capital gains tax.²

Advantages of Non-Cash Donations



Significant Tax Advantages

- Receive immediate charitable deduction at fair market value (up to 30% of adjusted gross income for appreciated assets).
- Eliminate capital gains taxes that would be incurred if the donor sold the asset directly.



Increased Charitable Impact

- By avoiding capital gains taxes, donors contribute more to charity than if they had liquidated the asset themselves.
- Assets in a DAF can be invested and grow tax-free, maximizing long-term giving potential.



Streamlined Administration

- The DAF sponsor handles the liquidation and grant distribution, simplifying the donor’s role.
- Reduces estate complexity and can serve as a structured giving vehicle across multiple generations.



Philanthropic Flexibility

- Donors can recommend grants over time instead of making a one-time gift.
- Allows donors to strategically distribute funds to charities based on their long-term impact goals.

Accepted Non-Cash Donations

- Public securities
- Life insurance
- Cryptocurrencies
- Commercial real estate
- Residential real estate
- S-Corp, C-Corp, restricted stock
- Agricultural assets
- Royalties and patents
- Art and collectibles
- Alternative investments

Ideal Times to Contribute Illiquid Assets

- Before a liquidity event
- When an asset has significantly appreciated
- To optimize tax planning in high-income years
- As part of estate planning
- To simplify wealth transfer

Work with your financial advisor to learn if contributing to the AssetMark Charitable Donor-Advised Fund would benefit you and your registered charity of choice.

1. Fundraising Trend: Increases in Non-Cash Giving, nonprofitfundraising.com, July 29, 2024, <https://nonprofitfundraising.com/fundraising-trend-increases-in-non-cash-giving/>
2. Integrating charitable planning into your financial and tax planning, www.dafgiving360.org, 2025, <https://www.dafgiving360.org/tax-2025#:~:text=First%2C%20you%20generally%20eliminate%20the,charities%20by%20up%20to%2020%25>

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Important Information

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Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.

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7941008.1 | 05/2025 | EXP 05/2027