

DUTIES PERFORMED BY CHARITABLE SOLUTIONS, LLC / DECHOMAI FOUNDATION, INC.



- Advisor Relationship Management
Frequent Communication
- Donor Relationship Management
Initial and Ongoing Communication
- Gift Negotiation
Donation, Responsibilities, Timing, Policies, DAF Agreement, Memo of Understanding
- Asset Due Diligence
Site Visit and Inspections, Environmental Appraisal, Tax Implications, Insurance Implications, Mortgage Implications, Liability Management, Legal Implications, Management Implications, Regulatory Implications
- Dechomai Asset Receipt
Manage Property During Holding Period
- Liquidation
Developing Sales Plan, Hiring and Managing Appropriate Professionals
- Grant Recommendation Due Diligence
- Administrative and Financial Operations

TYPES OF NON-CASH ASSET DONATIONS:

Commercial and Residential Real Estate

Farmland

Limited Partnerships and LLCs

International Assets

S-Corp Stock

C-Corp Stock

Restricted Stock

Timber deeds, crops and
other agricultural assets

Mineral rights including oil & gas partnerships

Royalties and Patents

Tangible personal property including works
of art and other collectibles

Other miscellaneous capital assets

DECHOMAI DONATION IS 1-3%
WITH MINIMUM DONATION OF \$10,000

CONTACT US FOR ADDITIONAL INFORMATION

NON-CASH DONATIONS IN TEN EASY STEPS

1 Donor wants to donate illiquid assets to
step one "Favorite Charity" but cannot due to Charity's lack of expertise, lack of time needed to complete the gift and desire to avoid taking on associated risks.

2 Charity contacts **Charitable**
step two Solutions, LLC to discuss the potential donation.



3 Charitable Solutions covers the process and
step three potential transaction with Donor and his/her advisors. A timing and fee quote is provided and all parties agree to proceed.

4 Donor completes Memo of Understanding
step four specifying all parties' responsibilities, expectations & fees. Donor completes DAF Agreement after reviewing Policies. ▶

▶ **5** Client transfers asset to Dechomai
step five Foundation to establish Donor Advised Fund.

6 Dechomai provides gift acknowledgement
step six documents and assists with Form 8283.

7 Dechomai sells asset for the highest
step seven price possible as quickly as possible and completes Form 8282.

8 Donor recommends grant to "Favorite
step eight Charity."

9 Upon due diligence and
step nine Board approval, Dechomai grants the entire net proceeds to Charity.



10 Dechomai closes Donor Advised Fund.
step ten