

InvestmentNews

The Leading News Source for Financial Advisers

By [Sue Asci](#)

November 25, 2008

The UBS Donor Advised Fund is being offered in partnership with the National Philanthropic Trust, a national public charity and service provider for donor-advised funds based in Jenkintown, Pa.

The fund offers a range of investment options, including exchange traded fund portfolios, mutual funds and separately managed accounts.

“Giving back is very important to our clients, so it was important for us to add our own donor-advised fund as part of our overall philanthropic services offering,” said Bill Sutton, head of philanthropy for the United States at UBS.

In light of an increased interest in supporting charitable causes in other countries, the National Philanthropic Trust works with clients to donate to eligible charities both in the United States and abroad.

The minimum contribution to the program is \$25,000, with subsequent contributions of at least \$5,000.

Donors may recommend grants of \$250 or more and determine how they would like to be recognized for the grants.

They also may name successors to their fund.

UBS Investments is a subsidiary of UBS AG of Zurich, Switzerland.