

Charitable Donation Accounts (CDA)

MFA Client Story

1 Minute Read

McQueen
Financial Advisors

Our clients are using Charitable Donation Accounts to make a difference in their local communities.

You can too!

One of Many Success Stories

Less than a year ago, a client shared with us that they planned to enhance their social mission and were very serious about helping the local community. McQueen's advisor introduced Charitable Donation Accounts and described how we can invest in higher yielding assets with different risk characteristics compared to standard investments. The higher yield allows credit unions to provide more money to advance their social mission. After making donations, the remaining earnings are often as high or higher than earnings from traditional investments alone.

Together with the client, we mapped out a plan to achieve their social mission.

Fantastic Results!

The Charitable Donation Account was funded in Spring of 2022 and has already been a success. The client recently shared these outstanding accomplishments:

"We provided food and presents for 165 local families."

"We are giving over \$50,000 per year to help launch a local YMCA."

Let's Work Together

We are so very proud of our team's work to provide this client a strong yielding CDA investment portfolio with exceptional results. Our work has provided the client with the funds to achieve their dreams and to make a compelling difference in their community.

Can we help you achieve your dreams?

Ask your MFA Advisor for a complimentary analysis of the income potential for your credit union as well as an introduction to Charitable Donation Accounts.