



**FROM GRANT TO GRATITUDE
TRACKING & STEWARDING
DONOR ADVISED FUND GIFT**



DAF Giving

✓ Track DAF Gifts Accurately

✓ Steward the Donor

✓ Increase Future Gifts



DAF 101

- A DAF is a charitable giving account managed by a sponsor (e.g., Fidelity Charitable).
- The donor recommends grants to nonprofits.
- DAFs are one of the fastest-growing charitable giving vehicles in the U.S.

✓ Larger Donations

✓ Donor Retention and Flexibility

✓ Ease of Giving

How to Track a DAF Gift



The Payment Comes from the DAF Sponsor



Track a Soft Credit to the Individual(s)



Educate your staff

Donation Received Major Gift (659) DAFpay Gift (1) RECEIPT

Gifts < Charles Schwab < Donation

OVERVIEW	DESIGNATIONS	PAYMENT NOTE										
GIFT AMOUNT \$1,000.00	CAMPAIGN <i>No campaign</i>	--										
CONTACT Charles Schwab	FUND <i>No fund</i>	Linked Gifts 1 + LINKED GIFT										
REFERENCE NUMBER 594	APPEAL <i>No appeal</i>	<table border="1"><thead><tr><th>RECEIVED</th><th>DONOR</th><th>SOFT CREDIT</th><th>DATE ↓</th><th>LINK TYPE</th></tr></thead><tbody><tr><td>\$0.00</td><td>Francine Ainsby</td><td>\$1,000.00</td><td>10/22/25</td><td>SoftCredit</td></tr></tbody></table>	RECEIVED	DONOR	SOFT CREDIT	DATE ↓	LINK TYPE	\$0.00	Francine Ainsby	\$1,000.00	10/22/25	SoftCredit
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\$0.00	Francine Ainsby	\$1,000.00	10/22/25	SoftCredit								
PAYMENT DATE 10/22/25	GIVING PAGE <i>No giving page</i>											

Stewarding the Donor



- ✓ **Attribute a Soft Credit to the Donor**
- ✓ **Send a Thank You**
 - **Focus on Impact and Gratitude**

Acknowledgement and Gratitude

Dear Jane,

Thank you for donating to **Dream Kids** through your **Donor Advised Fund at Fidelity Charitable**. We are honored to receive this contribution and deeply appreciate your commitment to supporting our mission.

Gift Details

- **DAF Sponsor:** Jane Smith
- **Donor-Advised Fund Name (if provided):** Fidelity Charitable
- **Gift Amount:** \$250.00
- **Date Received:** June 27, 2025

Please note that because this gift was made through a Donor Advised Fund, **no goods or services were provided in exchange**, and **tax acknowledgment will come from your DAF sponsoring organization**. This letter serves as our gratitude and confirmation of the grant we received on your recommendation.

We understand the significance of your gift and are committed to ensuring that it is used effectively to further our mission. We will keep you updated on the impact of your contribution and the progress of our work.

If you have any questions or would like further information about our organization or the impact of your donation, please don't hesitate to reach out.

Thank You,
Debbie

Debbie Nelson
Executive Director



Stewarding the Donor



- ✓ **Attribute a Soft Credit to the Donor**
- ✓ **Send a Thank You**
 - **Focus on Impact and Gratitude**
- ✓ **Build Relationships**
 - **Event Invites**
 - **Behind the Scene Updates**
 - **Impact Reports**

Stewarding the Donor



- ✓ **Attribute a Soft Credit to the Donor**
- ✓ **Send a Thank You**
 - Focus on Impact and Gratitude
- ✓ **Build Relationships**
 - Event Invites
 - Behind the Scene Updates
 - Impact Reports
- ✓ **Continued Support**
 - Multi Year Grants/Support
 - Legacy or Planned Giving

Recurring DAF Grants

Donors can set up automatic, recurring grants from their DAF

Why It Matters

- Creates predictable, ongoing revenue

How to Encourage It:

- Mention it directly in stewardship:
 - “You can recommend recurring grants from your donor-advised fund to provide ongoing support.”
- Highlight consistency and impact:
 - “Your ongoing support helps us plan and grow programs”
- Promote during:
 - Year-end giving
 - After a donor’s second or third DAF gift (good indicator of habit)

Pro Tip:

If someone gives multiple DAF gifts in a year, that’s your signal to:

- Reach out personally
- Suggest setting up recurring grants for simplicity and impact

Legacy Giving Through DAFs

Many DAF providers allow donors to name successor beneficiaries

Why It Matters

- DAFs often hold significant, already-charitable assets
- These are planned gifts that don't require estate complexity
- Easier entry point than traditional planned giving

How to Encourage It

- Keep it simple and donor-friendly:
 - “You can name [Organization Name] as a beneficiary of your donor-advised fund.”
- Frame it as an extension of their current giving:
 - “Continue your impact for years to come”
- **Include in:**
 - Major donor conversations
 - DAF donor stewardship emails
 - Planned giving campaigns

Mistakes



Don't ignore DAF gifts because the check came from a third party



Don't send a tax receipt to the donor



Don't miss the chance to nurture a long-term relationship with a generous supporter





DAF GIVING

 DonorDock

ADDITIONAL RESOURCES:

DAF TRACKING CHECKLIST

LETTER TEMPLATE

Find out more about DonorDock at
www.donordock.com