

STRATEGIES TO LEVERAGE DONOR ADVISED FUND PHILANTHROPY: HANDBOOK



by: Claire Axelrad

CLAIRIFICATION

 bloommerang

Strategies to Leverage Donor Advised Fund Philanthropy: Handbook





Donor management software
nonprofits actually **love** to use.

BLOOMERANG
[BLOOMERANG.CO](https://www.bloomerang.co)
1-866-332-2999

5724 BIRTZ RD,
INDIANAPOLIS, IN
46216



CLAIRIFICATION

Your pathway to Passionate
Philanthropy

CLAIRIFICATION
[CLAIRIFICATION.COM](https://www.clairification.com)

Introduction

The use of Donor Advised Funds (DAFs) as a means for individuals to make philanthropic gifts [continues to rise](#). DAFs accounted for 12.7 percent of overall philanthropy in 2018 compared with just 4.4 percent in 2010, according to The National Philanthropic Trust's 2019 DAF Report.

How much philanthropy are we talking about?

In 2018, pay-outs were \$23.4 billion ... but there's lots more in the collective DAF bank. In fact, total DAF assets per the Report were more than \$121 billion and climbing. Plus the total number of DAF accounts grew by leaps and bounds. Between 2017 and 2018, there was a 55% increase. In the first six months of 2019, distributions increased by 48% per Fidelity Charitable and by 33% per Schwab Charitable over the same period the previous year. [Both funds attributed the increased pace of giving](#) to changes in the Federal Tax Law in 2018. Yet, in fact, there's been a steady increase in DAF distributions over the past eight years.

There's no denying the growing significance of DAFs in the total philanthropy picture.

An added benefit, per a [University of Pennsylvania study](#), is that grant-making from DAFs tends to be resilient during economic downturns. This is due to the fact donors make distributions to their DAFs during times when they have windfalls, bonuses or otherwise good years – essentially reserving the money for future philanthropy, including rainy days.

If you want to grab your piece of the philanthropy pie, you must make it easy for donors to recommend DAF grants. Why?

1. You don't want to leave money on the table.
2. You want to best serve your donors.

This handbook is designed to help you with the what, when, who, where and how:

- **WHAT** is a DAF?
- **WHEN** might donors give to a DAF?
- **WHO** are DAF donors?
- **WHERE** are DAF donors best served?
- **HOW** to execute strategies to leverage DAF philanthropy

Let's begin at the beginning.

WHAT is a Donor Advised Fund (DAF)?

It's more or less a [personal charitable savings account](#) established by a donor, via a sponsoring organization (e.g., charitable organization, community foundation, tax-exempt fund affiliated with a financial institution) with the sole purpose of supporting charities. The donor has made the decision to be philanthropic, yet they haven't yet decided which charity will be the recipient of their largesse.

“A philanthropic giving vehicle administered by a charitable sponsor. A donor-advised fund allows donors to establish and fund the account by making irrevocable, tax-deductible contributions to the charitable sponsor. Donors then recommend grants from those funds to other charitable organizations.”

— [National Philanthropic Trust](#)



Then ... Get in the Game!

Clairification School @charityclarity

A DAF acts as a sort of parking lot. Let me try to explain using an analogy to the game of Monopoly.

Remember the 'Free Parking' square? It's the best! If you land on it, you get all the money that's been left by others who've had to "park" it there when assessed fees and fines. A DAF is like that money on the table. It's yours for the taking if you can figure out how to land, intentionally, on 'Free Parking.'

As established in the introduction, there's lots of money in this parking lot.

In fact, DAFs are philanthropy's fastest-growing vehicle. The largest concentration of 'foundation money' is now in corporate DAFs (e.g. Fidelity, Vanguard, Schwab) as well as community foundation donor-advised fund programs.

WHEN Might Donors Give to a DAF?

When might a donor want a philanthropy parking lot?

Here are some primary reasons:

1. The donor has a windfall.

This might be an unanticipated bonus, a sale of a stake in a family business, an inheritance, or a vesting of stock options. The donor may not yet know which charitable causes they want to support. However, they want to make sure they set aside this windfall for philanthropic purposes so it doesn't get frittered away and so they don't have to worry about its investment.

From the donor's perspective, they'll give to a DAF when thinking:

- *I want to use this windfall for charity, but it's more than I want to give to any one charity this year.*
- *I want to get a big tax benefit this year by making an irrevocable contribution to a DAF now.*
- *I like the fact that money in my DAF will grow tax free, giving me more to distribute later.*

2. The donor needs a tax deduction this year.

When donors give to a DAF they get an immediate upfront tax deduction based on the full fair market value of their gift. And ... they may spread out recommended philanthropic distributions over many years. With the passage of the recent Tax Bill in late 2017, fewer donors can itemize deductions unless they reach an amount exceeding the standard deduction.

In strategic response, some donors have taken to [“bunching”](#) donations to consolidate the equivalent of two to three years’ worth of giving into one gift to a DAF. They get a large tax deduction in the year of the gift, can recommend distributions from their DAF to charities over ensuing years, and can stop worrying about deductions (simply taking the standard deduction) in the years they don’t “bunch.”

DAFs are also useful when donors have appreciated assets, want the full benefit of the asset’s fair market value (FMV) when making gift, but don’t want to pay taxes on the growth.

For example, say a donor has a beach house purchased for \$100,000 that's appreciated to \$1 million today. If the donor sells the house, they'll pay taxes on \$900,000 worth of appreciation. If they donate the house, they'll get an income tax deduction based on the full FMV and completely avoid the capital gains taxes. [Not all DAFs accept real estate; many will if it's marketable. All accept appreciated stock. Net proceeds from the sale of appreciated assets go into the DAF. The donor can recommend distributions not just this year, but over as many years as they wish.]

From the donor's perspective, they'll give to a DAF when thinking:

- *I want to get a big tax benefit this year by making an irrevocable contribution to a DAF now.*
- *I like the fact that I can deduct up to 50% of my adjusted gross income (AGI) by giving to a DAF 'public charity' vs. only 30% of AGI when giving to a private foundation.*
- *I like the fact that I can avoid paying capital gains on a sale of appreciated assets by gifting the asset to a DAF, realizing the tax savings this year, and then being able to recommend charitable distributions over a period of years.*

3. The donor wants cost-effective professional investment and advisor services.

Sometimes, donors like to set aside a portion of their portfolio for philanthropy. With a DAF, they don't have to go through the time and expense of setting up a private foundation, which tends to require larger investments and costly start-up and maintenance costs. There is a low barrier to entry, and parking money with a trusted DAF investment advisor is additionally attractive as DAF investments grow tax free. Generally holders of DAFs will offer advice and assistance in vetting charities when asked.

From the donor's perspective, they'll give to a DAF when thinking:

- *I want to park my windfall in a safe, prudent investment where I won't have to make investment decisions.*
- *I like the fact that fees are minimal.*
- *I like the fact that my investment will grow tax-free, since it's all eventually going to a charitable purpose.*

4. The donor likes the convenience of a centralized philanthropic account.

Donors can avoid a lot of paperwork by centralizing their giving all in one place. They get one tax deduction and need not worry about collecting and saving contemporaneous confirmations of their giving from multiple charities. They also needn't write multiple checks or visit multiple donation landing pages to spread their philanthropy. They simply let the holder of the DAF know who they want to give to, and how much, and ... voila!

Additionally, DAFs can serve as the donor's philanthropic memory bank. Rather than have to start their search for charitable beneficiaries anew every year, they can simply ask the DAF administrator to remind them of their previous giving.

From the donor's perspective, they'll give to a DAF when thinking:

- *I like the fact that the administrator will provide useful services like vetting of charities, check-writing and tax-reporting.*
- *I like the ease of giving through a vehicle that keeps track of my previous year's philanthropy.*
- *I like the fact that I only need one year-end receipt for tax reporting purposes and don't have to collect receipts from multiple charities.*

In a Nutshell:

The reason donors may give to a DAF are not rare. You've likely got plenty of folks with DAFs in your donor database. You just may not know it. And what you don't know can hurt you, especially if you're not making it easy for these folks to give to you through their DAFs.

Let's review when donors will give to a DAF:

- Have unanticipated bonus
- Sell stake in family business
- Inherit
- Stock options vest
- Need tax savings this year
- Want to avoid capital gains on appreciation
- Want worry-free investing
- Want tax-free growth
- Want personal services
- Want to set aside money for philanthropic purposes
- Want ability to recommend distributions to multiple charities for years to come

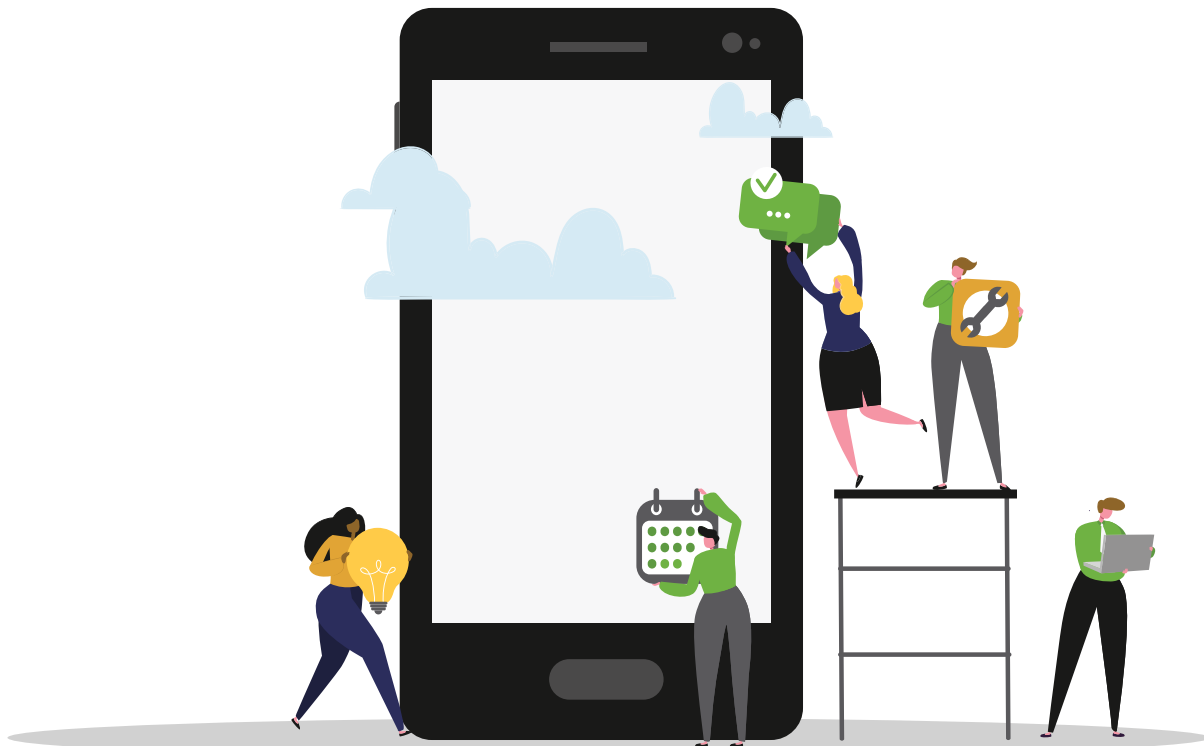


WHO are DAF Donors?

DAF donors are not the same as the stereotypical foundation donor who has established a multi-million dollar repository for their philanthropy. In fact, because they are so easy to establish, have low overhead, and do not have strict distribution and bookkeeping requirements, a broad spectrum of donors participate.

Minimums to establish a DAF vary, but an initial donation of at least \$5,000 is typical; subsequent donations may be smaller. Funds usually set a minimum gift amount, which may be \$50.

Fidelity Charitable Giving reports that 57% of their DAF accounts have balances of less than \$25,000, while several thousand have balances of more than \$1 million.



While diverse, DAF donors exhibit some common characteristics:

1. Strong prioritization of giving.

DAF donors don't simply give on a whim. They've taken the extra step of setting up a formal charitable distribution vehicle. They're serious about philanthropy!

2. Desire to make an impact today.

Unlike private foundations, DAFs give their money away relatively quickly: 38% of the dollars donated are gone within a year, 74% is distributed within five years. Most DAFs are set up so they do not last beyond two generations. Many foundations, on the other hand, are set up as perpetuities that give out the bare minimum of 5% of their assets each year.

3. Make larger than average gifts.

Nonprofits report gifts from DAFs tend to be larger than typical contributions. Per Vanguard Charitable, for example, their average DAF gift is nearly \$12,000.

4. High rate of volunteerism.

DAF donors often volunteer with grantee organizations through direct service and/or committee work. Through those experiences they hear of needs first-hand from the population they seek to help, and gain perspective on how they can become part of the solution.

5. Long-term thinking.

DAF donors take a thoughtful, organized approach to philanthropy. They're often interested in collaborating with charitable recipients, and they care about demonstrated effectiveness.

6. Desire to engage family members in giving decisions.

Sometimes the funds will be set up to pass to succeeding generations. As a result, many DAF donors will sit down with family members to discuss how to allocate annual philanthropy. Also, anyone can contribute to an already established DAF. Children, for example, may wish to contribute to their parents' fund in honor of a special anniversary or other occasion.

WHERE are DAF Donors Best Served?

A recent article in Stanford Social Innovation Review reveals [research from Fidelity Charitable](#) showing the choice to establish and use a donor-advised fund may predispose its holder to value feedback.

“DAF giving is rooted solidly in the donors’ desire for greater impact — both in terms of maximizing financial resources for giving, but also for creating a more organized and thoughtful approach to philanthropy, including selecting which nonprofits and projects to fund.”

– [Stanford Social Innovation Review](#)



**Where can you best show donors you're worthy of distributions from their DAF?
Here are likely venues:**

1. Wherever you can show impact.

Remember, DAF donors are serious about philanthropy. You need to show them you're DAF-worthy. If your website is dull, old, egocentric and focused on facts, figures and processes, you won't impress. Share emotional success stories, using photos, videos and testimonials, to specifically demonstrate your beneficial impact. Do this on your website, newsletter, blog, and via email and social media. Optimize for search so that DAF donors looking to help in your area of expertise will easily find you. DAF donors are in pursuit of what works.



2. Wherever you can tell what was accomplished.

Always show donors the impact of their philanthropy. This will persuade prospective donors they can trust you to use their gift wisely and well, plus it will predispose those who've already given to do so again. Folks need regular reports on how their investments are doing. For DAF donors to connect dots in their giving portfolios, they need feedback from populations they seek to help.

- Send warm thank you's with stories of impact. Thank you kick-starts trust-building. Subsequent communications of gratitude and impact cements it.
- Ask for DAF donor feedback.
- Listen for insight on areas of need, challenges, and opportunities. Talk to DAF donors. Don't treat them differently because the gift came from a third party.
- Provide testimonials from folks that the donor seeks to help.
- If you can't talk directly to the donor, talk to the donor's administrator; ask them to share your feedback.

3. Wherever you can meet with local DAF sponsor organizations.

Let your community foundation know you exist and you'd love to work with them to further their DAF donors' interests. Often these advisors are looking for organizations (like yours!) to recommend. You provide an invaluable service by offering on-the-ground insight into root causes of problems and opportunities to make a difference by offering more than band-aid solutions. Get on their radar; build a relationship. These folks influence millions of dollars of philanthropy!



HOW to Attract and Leverage DAF Philanthropy: 9 Strategies

1. Become a sleuth.

Look at DAF donations to other organizations, either local or within your field of operations, to get a sense of whether any of your supporters may have such a fund. Also look at annual reports from organizations which are traditional repositories of DAFs, such as your local community foundation, United Way or Jewish Community Federation. The biggest repositories of DAFs today are Fidelity Charitable, Schwab Charitable, the Silicon Valley Community Foundation, and Vanguard Charitable.



2. Look for hints as to donor interests.

Pay attention to the types of causes your donors are supporting with their DAFs and consider how you might tailor a philanthropic approach to them based on these interests. For example, if you're a comprehensive human services program, and you notice your donor has supported a homeless shelter in your community through their DAF, meet with them to talk about the services your organization provides to address the problem of homelessness. Or if you're an arts organization, and you notice your donor has supported high school scholarships through their DAF, meet with them to talk about stipends you provide for low-income kids to attend performances. Often donors aren't aware of the full depth and breadth of what you do.



3. Ask your donors if they have a DAF.

It can't hurt to ask folks if they have a Fund, and if they'd like to make a distribution to you from this Fund. [In Major Donor Fundraising: What to Know about the New Tax Law](#), I wrote that some of your donors may have decided to “bunch” donations in one year in order to make the new tax law work in their favor when it comes to taking tax deductions. So ... now they've got a DAF filled with money just waiting to be distributed! When you approach them for a gift this year, they may just have forgotten this little “burning pocket.” It's a painless way for them to give, and you may end up with a larger gift than you'd otherwise have received — just because you gave them a reminder!



4. Follow clues.

When you receive a gift recommended from a DAF, checks won't come directly from the donor, but from a sponsoring organization like a financial firm (e.g. [Fidelity Charitable](#), [Charles Schwab](#), [Vanguard](#)), a community foundation or another charity. Try to ascertain the donor's identity so you can steward them appropriately.

Some DAF grants may not include the donor's full name and contact information, but Vanguard reports only 5% of their donors choose to remain anonymous. Sometimes simply examining the accompanying paperwork that comes with the check will reveal the answer (e.g. "Made from the Jen Generosity Fund" or "Recommended from the John Doe Memorial Fund."). If Jen Generosity is your donor, or if Jane Doe's kids sit on your board, you'll know who your donor is! You can also look at past DAF recommendations to see if you find similar ones among your donors, especially if they regularly give and have not yet done so – to your knowledge. Call and ask them! This has the side benefit of acting as a good reminder if it wasn't them.

5. Promote the fact you accept DAF gifts.

Donors know what you tell them. People have a funny way of making assumptions. If you don't let them know you accept gifts from DAFs or, for that matter, gifts from IRAs or bequests from wills or trusts, folks just won't think of you when it comes to making their philanthropic distributions. So include this information prominently on your website and in your donor communications.

Here are two examples from the International Rescue Committee and Jewish Family and Children's Services:

Support the IRC through your donor-advised fund

One way you can make a lifesaving difference for refugees is by making a gift through your donor-advised fund (DAF). If you have a DAF, you can simply fill out the DAF Direct form on this page and log into your account to make your grant recommendation.

Your gift today will help the IRC:

- provide medical care, clean water, emergency shelter, and other lifesaving support to refugees caught in crisis;
- support recently resettled refugees in the United States as they adjust to their new homes, learn English, pursue job opportunities, and reclaim control over their future;
- deliver education opportunities for millions of refugee children;
- and provide safety and protection to the most vulnerable populations around the world.

DONATE NOW

Give Online
Your gift via our secure online donation system is tax-deductible and goes toward families, individuals, and seniors who need urgent help. [Donate now >](#)

Give Through Your Employer's Match
Matching gifts provide you with an easy way to potentially double, if not triple, your original donation! [Click here to see if your company will match your donation >](#)

Gifts of Stock
With a gift of appreciated stock you support people in need while bypassing capital gains taxes and receiving substantial income tax deductions. [Click here for stock donation instructions >](#)

Car Donations
The process is simple. [Click here](#) or **call 877-913-9937**. Our service picks up the car and handles all of the paperwork. The sale proceeds go directly to our programs for children in need.

Give Through Your Donor Advised Fund 
Start a Donor Advised Fund at Jewish Family and Children's Services that will serve as your own private "mini-foundation." [Learn how >](#) Or, designate Jewish Family and Children's Services as a beneficiary of your external Donor Advised Fund to support programs of your choice.

Give new from your Donor-Advised Fund 

6. Provide comprehensive, up-to-date information to Guidestar-Candid.

Many DAF sponsors share the nonprofit profile information you provide to GuideStar-Candid with their donors. If they don't share it, they use it themselves to help their clients make informed, strategic decisions. For example, as they research charities to support, Vanguard Charitable advisors make more than 15,000 searches each month via this [National Nonprofit Directory](#).

Even were DAFs not to exist at all, there are tens of millions of donors and funders who search this resource – and you should be putting your best foot forward. It's the cheapest advertising around!

- Claim your [Nonprofit Directory profile](#)
- Update your information
- Have that information reach tens of millions of donors and funders through more than 200 GuideStar-Candid partners (e.g., Amazon Smile; Facebook; JustGive; Network for Good; Salesforce.org; VolunteerMatch; all major U.S.-based donor advised funds; more than 16 leading community foundations, and more than 35,000 staff from private foundations such as the California Endowment).

7. Steward DAF donors appropriately.

DAF donors have already received a tax deduction for their giving, so don't confuse them (or the IRS) by intimating they can double up on this.

- **Do not thank donors for their “tax-deductible gift.”** They already took the tax deduction when they gave to their DAF. A good way to handle this is simply to say “Thank you for your \$250 gift made from your Jen Generosity Donor Advised Fund.” This gives a heads up to their accountant not to double count this when they prepare your donor's tax return.
- **Do not ask the DAF sponsor to let you know this gift fulfills the donor's pledge.** This used to be a complete no-no, and you had to be careful not to even mention to your donor when you thanked them that this gift fulfilled their pledge. The IRS has eased up on this, but DAF sponsors are still not allowed to put this in writing.

- **Do not tell the donor they will receive anything of value.** For example, if they are using this gift to buy a gala ticket, they're required to subtract the fair market value of what they'll receive for purposes of tax deductibility. Since they already took a 100% tax deduction for this money, they can't get anything of value back. To keep it proper, you'll need to tell them they owe you the amount it cost you for the meal and entertainment.
- **Do thank donors for their gift.** Just because the check came from their DAF, and not from the donor directly, is no reason for you to ignore the fact that saying thank you is just about the most important thing you can ever do! It lets the donor know you received their gift, it shows how appreciative you are, and it gives you an opportunity to reassure them they're making the impact they intended to make.
- **Do thank the DAF sponsor organization.** Remember, the folks running these funds are people too. If you build a positive relationship with them, they just may recommend you to other donors who are looking to enact the values your organization enacts.

- **Do avoid common pitfalls with crediting and reporting DAF gifts.** Make sure your staff understand how to credit these gifts by inputting them into your database properly. Most organizations will set up the DAF as the donor of record for the particular gift, while giving a “soft credit” to the individual donor for having recommended the distribution. Be sure to set up your database to facilitate this type of record-keeping. And remember when pulling reports of donors you must include donors with soft credits or you’ll begin to reflect some of your major supporters as “lapsed.” Soft credits can be easily missed by a lot of CRM standard selects. Also, be sure your CRM is set up to acknowledge and report back to both the DAF sponsor and the soft-credited donor.



8. Prioritize proactive engagement with DAF donors.

It makes common sense to consider DAF donors as a special segment for donor cultivation. Don't forget DAF donors are more serious about philanthropy, and make larger gifts than the average person. So think about how you might further engage these folks and make them feel like valued members of your community.

Ask DAF donors to participate in direct service volunteering. This helps donors see your mission come to life. And since we know many DAF donors like to involve family members in philanthropy, why not include family members (kids; grandkids; grandparents) and tailor volunteer opportunities accordingly. I used to bring families with older kids to package beans and rice when I worked at a food bank; I invited young kids to decorate gift cards to include in care packages delivered to seniors when I worked at a social services agency). Plant seeds that will grow and blossom.

Ask DAF donors to join committees. It's a great testing ground and pathway to board involvement. It enables them to learn a lot more about your work and impact. And it also connects donors to multiple folks who are passionate about your organization, serving as powerful testimonial to your credibility and creating pleasurable opportunities for networking and socialization among people with shared values.

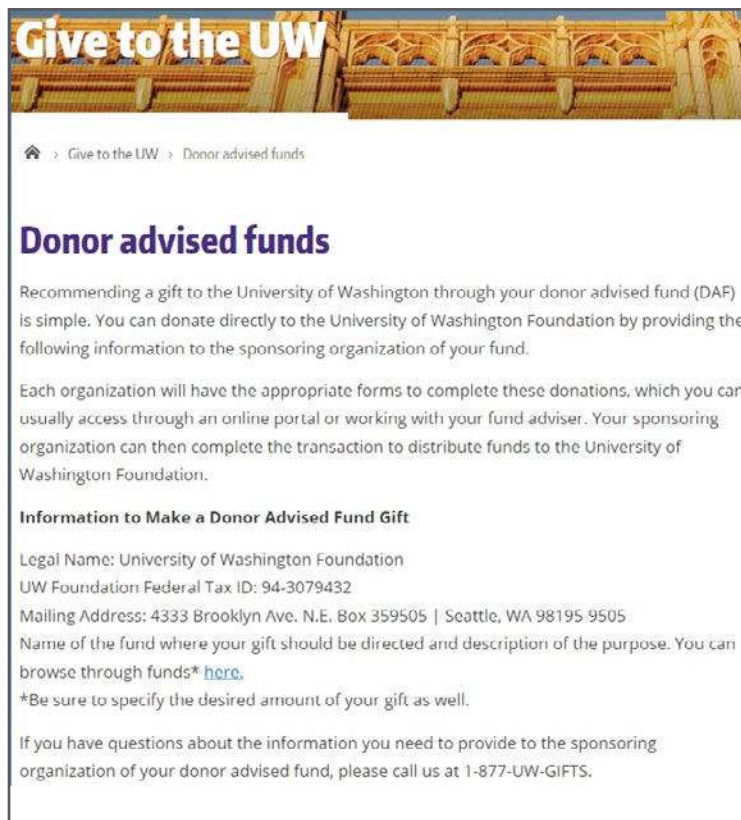
Consider which DAF donors might be prospects for upgraded and/or [major gifts](#). You may want to include some of these supporters in your preliminary major gift [donor portfolios](#). Then go about the process of [qualifying](#) them to ascertain whether they'd be open to building a deeper relationship with you. If so, that's when you'll [put in place a cultivation plan](#) tailored just to them!



9. Make Giving DAF Donations Easy

What makes DAF giving user-friendly? I've pulled some examples from a number of charities to give you ideas from which you might borrow.

University of Washington has a separate sub-menu for DAFs.

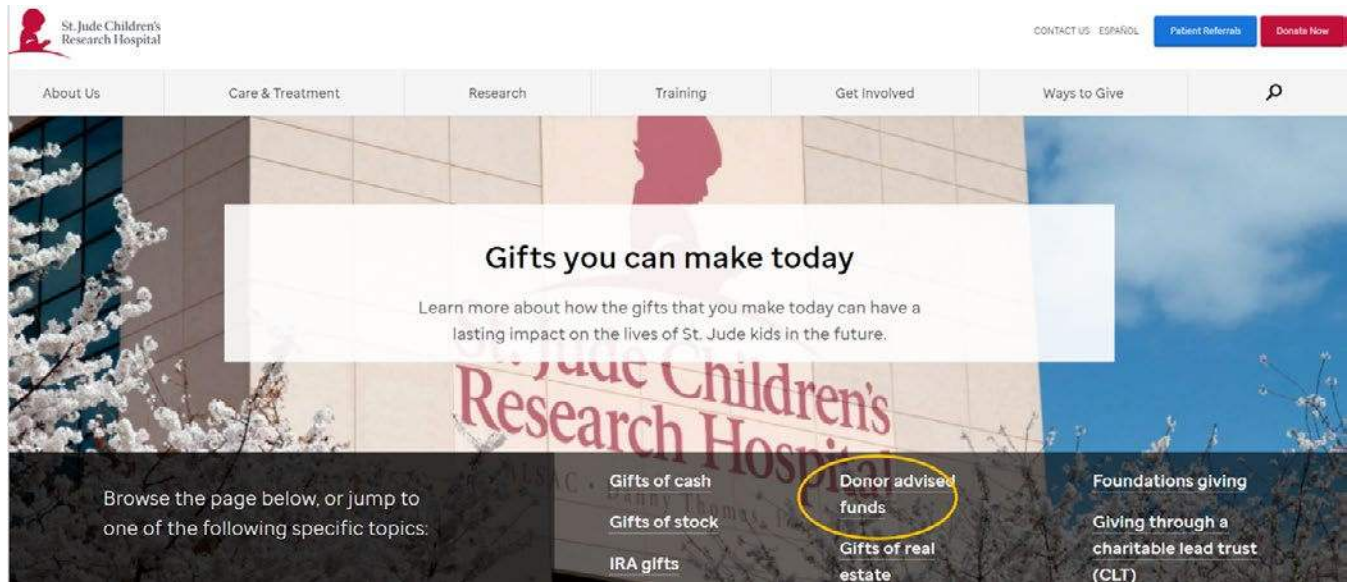


Jewish Family and Children’s Services offers answers to frequently asked questions, including DAF giving on their standard “How to Donate” page.

Questions

- ▶ Is my donation secure?
- ▶ Is this donation tax deductible?
- ▶ Will I receive a receipt?
- ▶ What is your Tax ID Number?
- ▶ Who can I contact about donating?
- ▶ Can I donate via check or in other ways?
- ▶ How do I give using my Donor Advised Fund?
- ▶ Can JFCS accept Employer Matches?

St. Jude Research Hospital devotes an entire web page to different giving vehicles, among which DAFs are included.



When you click on the DAF vehicle, St. Jude's takes you to a DAF landing page.

Donor advised funds

A donor advised fund (DAF) is a type of charitable investment account that provides an immediate tax benefit to you, and allows you to recommend grants to charities of your choice over time.

Granting to St. Jude through your DAF is simple and easy. You can recommend a gift to St. Jude today, or on a recurring basis (monthly, quarterly, semi-annually or annually) to help the kids of St. Jude.

[Learn More About Donor Advised Funds](#)

St. Jude Children's Research Hospital

Tax ID 62-0646012

Mailing address

St. Jude Children's Research Hospital

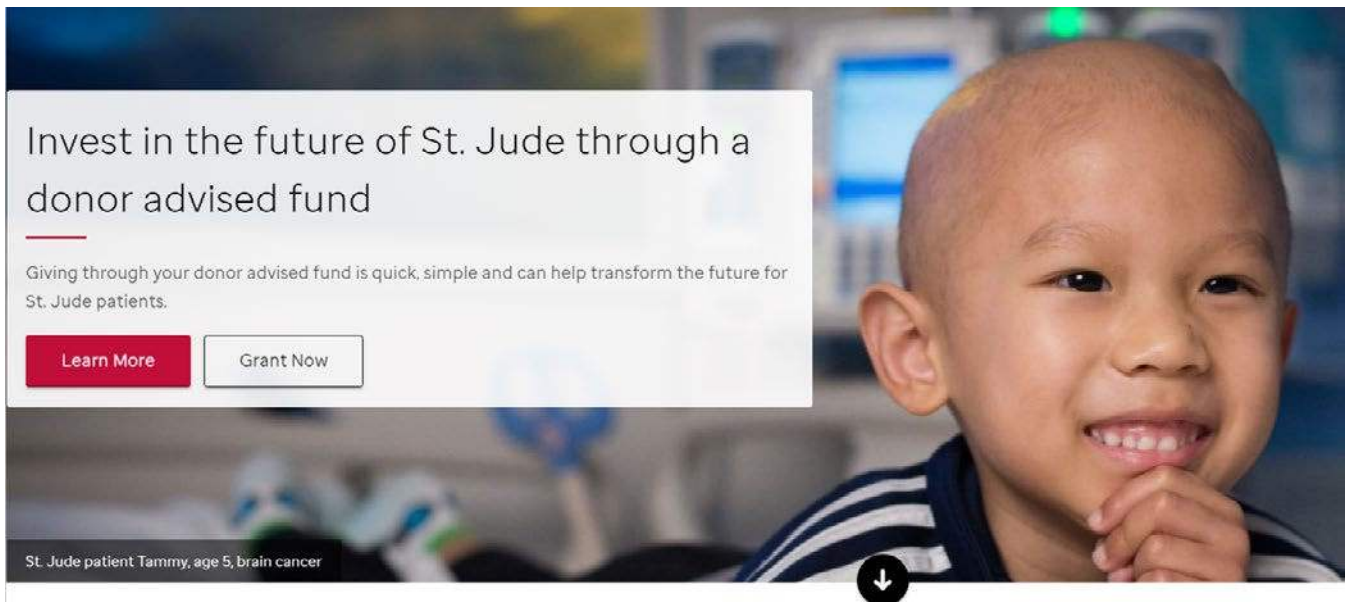
501 St. Jude Place

Memphis, TN 38105

Let us know about your gift so we can better plan for our future and thank you for your generosity.

Call us at **(800) 910-3172**, or [contact us online](#).

When you click to learn more, St. Jude takes you to a compelling visual.
It includes a button where you can immediately make your grant or learn more.



Invest in the future of St. Jude through a donor advised fund

Giving through your donor advised fund is quick, simple and can help transform the future for St. Jude patients.

[Learn More](#) [Grant Now](#)

St. Jude patient Tammy, age 5, brain cancer

When you click to make your grant, St. Jude makes it super easy if you have an existing DAF at one of the major sponsors.

When granting through your donor advised fund, please use the following information.

Tax ID	Mailing address
St. Jude Children's Research Hospital Tax ID 62-0646012	St. Jude Children's Research Hospital 501 St. Jude Place Memphis, TN 38105

If you already have a donor advised fund, you can select your financial institution and log in to your account to begin granting to St. Jude:

Fidelity Charitable	Vanguard Charitable	Schwab Charitable	Goldman Sachs
National Christian Foundation	Raymond James	Silicon Valley Community Foundation	National Philanthropic Trust

AARP offers a DAF landing page with persuasive language and a widget installed on their website from [DAF Direct](#). It's free, there are no processing fees and it allows donors to log into their charitable accounts with major financial institutions (Fidelity, Schwab or BNY Mellon).

You can also build links to additional options (as did St. Jude's and AARP) if you want to make an investment to do so. Donors use a pull-down menu to select the donor-advised fund, then fill in the amount and purpose of the gift and click the "Next" button to get to the donor-advised fund site. The application automatically transfers the information to that site, and the donor can complete the gift with a few clicks. The application was created by Fidelity Charitable, the nation's largest commercially sponsored donor-advised fund, in collaboration with other donor-advised funds.

AARP Foundation
For a future without senior poverty.

Donor Advised Fund Giving

If you have a Donor Advised Fund giving account you can make a big impact on senior poverty. ←

It's a troubling fact that over 13.2 million older adults do not have enough money to make ends meet. That's 1 in 7 seniors on limited incomes who simply can't afford to pay for utilities, rent, medication and food.

Giving through your Donor Advised Fund is a powerful way to help struggling seniors. If you've got it, use it!

It really does feel good to give to those in need!

DAF DIRECT
Directly connecting donors to charitable causes

[What is this?](#)

Donate now from:
--Please select--

Designation:
where needed most

Amount:
\$

NEXT

The provided DAFDirect Widget will take you to your Donor Advised Fund for:

- Fidelity Charitable
- Schwab Charitable
- BNY Mellon

Or click below for one of the following and make AARP Foundation your Donor Advised Fund charitable designation:

- American Endowment Foundation
- Ayco Charitable Foundation
- Jewish Communal Fund
- Raymond James Charitable
- Vanguard Charitable

Don't Turn a Blind Eye to DAF Support

Not only are there more and more of them, but DAF grants are increasing as a percentage of overall philanthropy. Per [Jay Love](#), Bloomerang founder, “In my opinion, gifts/grants from DAFs will be the largest percentage of the annual dollars received by 2030, which is basically just 10 years away.”

Don't miss out!

- Prioritize learning more about this subject
- Be on the lookout for DAF donors
- Plan to promote fact you accept DAF grants
- Plan to cultivate and steward these special donors

You'll be glad you did!

About Claire Axelrad

J.D., CFRE

Claire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.



[Find out more](#)

About Bloomerang

We believe in the value of life with a mission, and we applaud the choices nonprofit organizations make to improve the world. We exist because they exist.

We take great pleasure in creating tools and teaching principles that help passionate nonprofit organizations make smart decisions that are proven to help them reach out, grow and thrive.

Our Strategic Vision: to be the world’s best developer and deliverer of tools and perspectives that generate value for nonprofit donor relationships.

Our Core Purpose: to improve donor retention in the nonprofit world.

At **Bloomerang**, we’re helping nonprofits become more successful at increasing revenue. Our user-friendly software is designed to help organizations naturally boost donor engagement, fundraising and retention through best practices and a user-friendly donor database interface.

Take a look at why **Bloomerang** has been rated “The Best Donor Management Software” based on user feedback. Explore a demo of our software here.

[Visit our Website for a video demo](#)



 bloomerang

BLOOMERANG.CO

1-866-332-2999

