

Stewarding Donor-Advised Fund Donors

A gift that arrives through a Donor Advised Fund (“DAF”) still comes from a person who chose **you**. The structure just adds a step, which can make stewardship feel challenging - but with the right approach, you can build a lasting connection.

Understand the Relationship Chain

Navigating a DAF gift effectively begins with understanding the flow and recognizing how the roles are divided between Donor, Foundation, and Charity.



The Foundation issue the official tax receipt to the donor and manages all the legal and accounting requirements. Your job isn't to replicate what the Foundation does.

Your job is to build the relationship we can't: show the donor the impact of their choice.

Get on DAF Sponsors' Radar

Most DAF grants are donor-initiated searches. Being easy to find matters more than any outreach and public access to your financial reports allows our research team to independently evaluate your organization publicly accessible on your website.

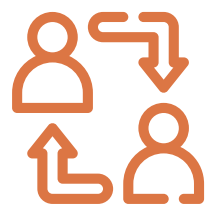


- **CRA Data:** Ensure your legal name, CRA registration (BN) number, and program description are current in your annual filings.
- **Website Essentials:** Keep your legal name, mission statement, current impact summary, BN Number, and annual financial statements publicly accessible on your website.

Build the Relationships for the Long Term

Cultivating DAF donors as long-term partners can unlock ongoing support and broader visibility for your organization.

- **Ongoing Engagement:** DAF donors frequently make recurring gifts. Treat identified DAF donors like core supporters.
- **Introductions:** Reach out to see if we can connect you with the donor.
- **Public Recognition:** Keep us updated on your stories so we can help showcase your work to our donor community.



Identify and Thank the Donor Behind the Gift

Prompt and accurate acknowledgment of DAF gifts helps establish donor trust and ensures your communications remain efficient.

- **Check Grant Notices:** Grants often list the DAF name unless they specifically requested anonymity.
- **Thank the Donor:** When a donor is identified, thank them, through the Foundation, as you would any major donor and include them in your impact updates and event invites.
- **Mailing Lists:** Please remove Place2Give from direct annual solicitations and limit duplicate mailings to our administrative office. Our donors are already aware of your work!
- **Anonymous Gifts:** If a gift is anonymous, send a thank-you note to Place2Give. We will forward it directly to the donor.

Explore Legacy and Planned Giving

A DAF donation is rarely a single transaction. Integrating DAF options into your planned giving efforts allows donors to extend their impact far into the future.

- **Successor Beneficiaries:** Donors can name your charity as a successor or beneficiary of their DAF, functioning similarly to a bequest.
- **Planned Giving Integration:** Mention DAF giving options in your planned-giving materials and bring it up during bequest conversations with existing supporters.

Quick Reference Checklist

- ✓ **Verify** your legal name, CRA number, and mission summary are accurate on your website and CRA filings.
- ✓ **Post** current impact reports and audited financial statements publicly.
- ✓ **Review** all grant notices for donor contact details before marking a gift anonymous.
- ✓ **Add** identified DAF donors to standard stewardship and impact communications.
- ✓ **Suppress** Place2Give's administrative address from direct mail appeals and duplicate marketing lists.
- ✓ **Ask** Place2Give about forwarding thank-you notes or facilitating donor introductions.
- ✓ **Include** DAF giving and beneficiary options in your legacy and planned-giving materials.
- ✓ **Educate** fundraising staff on DAFs and link to Foundations (like Place2Give) on your donation pages.



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