

An aerial photograph of a vineyard. The rows of grapevines are dark green and densely packed, creating a strong diagonal pattern across the frame. In the upper right quadrant, two people wearing white hats and light-colored clothing are visible, working in the vines. A green bucket sits on the ground near them. The overall lighting is soft, suggesting an overcast day or late afternoon.

Demystifying Donor Advised Funds

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Today's Agenda

- Brief History
- How DAFs Work
- Why Use DAFs
- Types of Providers
- DAF Critiques
- Working with DAFs



✦ A Brief History

- 1914
- 1915
- 1931
- 1991
- 2022

How Do DAFs Work? ✨

- Make a donation
- Receive a tax deduction
- Consider investment options
- Support causes you care about



Why Do People Use DAFs?

- Taxable Events
- More Time to Consider Donations to Nonprofits
- Streamlined Giving
- Seeking Philanthropic Support



Why Do People Use DAFs?

- Family Philanthropy in Lieu of Family Foundation
- Corporate Philanthropy in Lieu of Corporate Foundation
- Gifting Non-Cash Assets



Types of DAF Providers

- Community Foundations
- National Providers
- Religiously-Affiliated Organizations
- White-Labeled
- Single-Issue Charities





DAF Critiques

- Warehousing Money
- No Mandatory Payout Rates
- Anonymity
- Private Foundation Giving to DAFs
- Equitable Philanthropy
- Hate Groups



Working with DAF Donors

- Fundholders are Individuals, with Values and Priorities
- Most Donors Already Know What They Want to Support
- DAF Donors are Still Looking for Stewardship
- Engage as Planned Giving Opportunities





Working with DAF Providers

- Be Receptive to DAF Grants
- Check With the DAF Provider If You Have Questions
- Get to Know the Program or Community Impact Staff
- We Want To Partner, Not Compete



Summary

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- Why Use DAFs
- Types of Providers
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The image features a white rectangular area in the center, which serves as a background for the text. The surrounding area is decorated with various patterns and colors: a dark blue vertical band on the left, a yellow and pink diagonal band on the right, and a grey band at the top with white and blue floral motifs.

Questions?



Thank you

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