Four moves to build a donor-advised fund strategy

Start with the report. It tells you whether this is a housekeeping fix or a real piece of your future revenue that has been arriving anonymously for years.

START HERE

DAF gifts last year $_____ DAF donors _____ Advisors you can name _____

01 Find out who is already giving this way.

Run the three-year report on Fidelity, Schwab, Vanguard, the National Philanthropic Trust, and your community foundation. Write the total.

02 Fix the acknowledgment problem.

Call your three largest sponsors. Write down what donor information each one will release, and who asks for it.

03 Ask for the DAF gift explicitly.

Draft the one line for your appeals. Confirm your full legal name and tax ID are visible on the giving page.

04 Talk about timing, since nobody else will.

Name the three DAF donors you will ask about a multi-year recommendation, and when you will ask.

Completed by _____ Date _____

Companion to **How to Build a Donor-Advised Fund Strategy**
commongroundconsulting.org/blog/how-to-build-a-donor-advised-fund-strategy