

Join the conversation!
Use our special
hashtag, #DAFDonors

Demystifying national donor-advised funds

A deeper look at Fidelity Charitable® donors and how they give



Donor-advised funds: The multiplier effect



\$170,000
additional funding

.....

79
additional
preschoolers

The impact of DAF giving is growing

Total charitable giving in 2017

\$410 billion¹

5% growth from previous year



Total giving from DAFs in 2017

\$19 billion²

20% growth from previous year

¹Giving USA 2018

²National Philanthropic Trust 2018 Donor-Advised Fund Report

Giving with a donor-advised fund (DAF)



¹For contributions of complex or non-publicly traded assets generally fair market value is determined by a qualified appraiser in compliance with IRS regulations.

There is a vast array of donor-advised fund sponsors



There are **more than 1,000 charities** with donor-advised fund (DAF) programs, including national DAF sponsors.¹

1,000 charitable organizations sponsoring DAFs

- Academic institutions
- Religious charities
- Issue-specific funds
- Community foundations



¹ National Philanthropic Trust 2018 Donor-Advised Fund Report

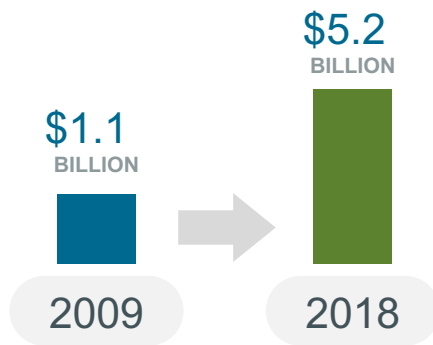
Fidelity Charitable is one of the nation's largest grantmakers

204,292

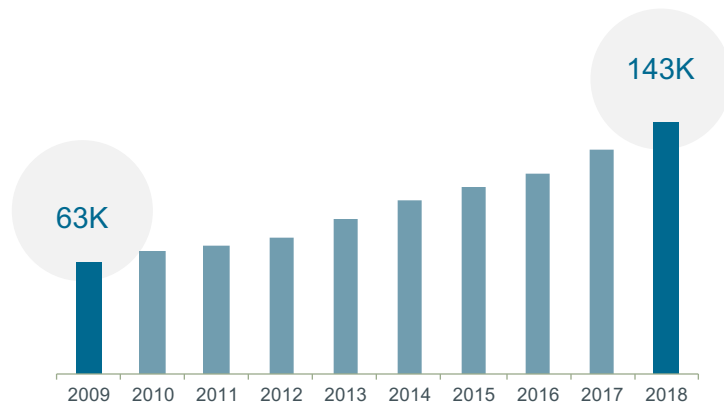
NUMBER OF DONORS

123,114

NUMBER OF GIVING
ACCOUNTS



Total dollars granted to charities



Total charities supported

Grant dollars have grown by nearly 5 times,
supporting twice as many nonprofits as 10 years ago.

Introducing a typical Fidelity Charitable donor



Video: https://youtu.be/4ibKR_9ZPhc

DAF donors are strategic and committed

Planning for the future, focusing on philanthropy

55^{yrs}

AVERAGE DONOR AGE
AT OPENING

79%

VOLUNTEER THEIR
TIME TO CHARITY²



62%

TO SUSTAIN MY GIVING THROUGH RETIREMENT



76%

TO DONATE APPRECIATED ASSETS,
SUCH AS PUBLICLY TRADED STOCK,
PRIVATELY HELD ASSETS



68%

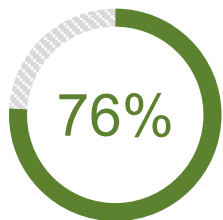
TO GIVE ME TIME TO
DECIDE WHERE TO GIVE

¹2016 Fidelity Charitable Giving Report

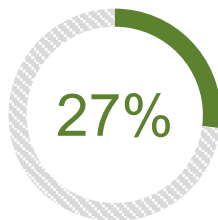
²Fidelity Charitable, *Time and Money: The Role of Volunteering in Philanthropy*, 2014

Other reasons donors use a DAF

Financial Reasons

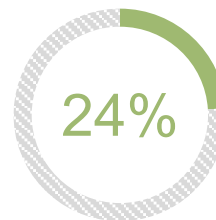


For investment growth of charitable assets



Financial Windfall

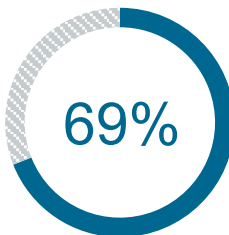
Because of a financial windfall, such as an inheritance or sale of a business



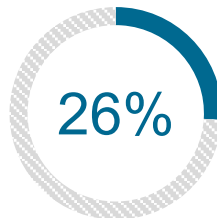
Year-End Bonus

To fund my giving from a year-end bonus or other variable income

Strategic Planning Reasons



To better organize and keep a record of my giving



Family

To bring my family together around giving



Donors actively support the causes they care about



\$17,670

Median Giving Account® balance



58%

Percentage of Giving Accounts
with balances under \$25,000



8%

Number of Giving Accounts with
balances of more than \$250,000

5.8

AVERAGE GRANTS PER
GIVING ACCOUNT IN 2009



10.4

AVERAGE GRANTS PER
GIVING ACCOUNT IN 2018



\$4,092

AVERAGE GRANT SIZE

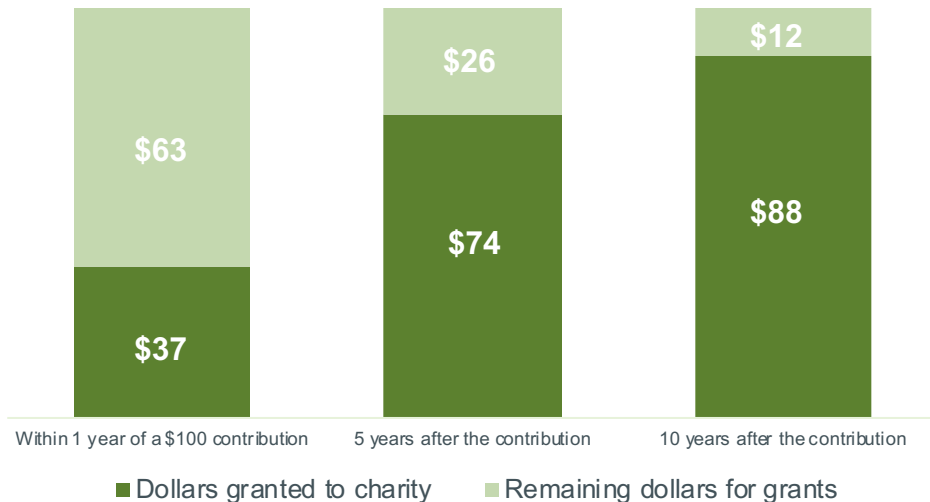


582 grants

OF MORE THAN \$1 MILLION

Three-quarters of contribution dollars are granted within 5 years

Pace of contributions granted to charity



Since inception:

NEARLY
GRANTED TO CHARITIES

\$35 billion



61%

OF ALL CONTRIBUTIONS RECEIVED¹

MORE THAN

20%
per year¹

¹Internal Fidelity Charitable data

The giving patterns of donors mirror national trends

Donors support both local and national charities, with half of grant dollars going to donors' home states¹



49%

of grant dollars stay in donors' home states

Education, society benefit, and religion are top charitable sectors

Fidelity Charitable Donors



29%
Education



15%
Religion

Overall US Giving²



14%
Education



31%
Religion

¹2017 Fidelity Charitable Giving Report

²2018 Giving USA

It's easy for donors to recommend grants online

The screenshot shows the Fidelity Charitable donor dashboard. At the top, there's a navigation bar with links for Feedback, Contact us, Your profile, and Log out. Below this, a header section displays 'Accounts (3)' and 'Demo Account Family Charitabl... #1053934'. A central area shows a welcome message to 'David!' and a balance of '\$48,450.16' available to grant. Two buttons, 'Fund your Giving Account' and 'Grant to charities', are present, with corresponding YTD contributions and grants of \$100,000.00 and \$28,000.00 respectively. A table titled 'Recent grant activity' lists several grants to HABITAT FOR HUMANITY INTERNATIONAL INC and AMERICAN ASSOCIATION OF ZOO KEEPERS. A sidebar on the right asks 'Is your profile complete?' and provides a link to 'Update your profile now'.

Welcome, David!
Available to grant
\$48,450.16

Fund your Giving Account
YTD Contributions
\$100,000.00

Grant to charities
YTD Grants
\$28,000.00

Submitted	Charity	Amount	Status
9/19/2019	HABITAT FOR HUMANITY INTERNATIONAL INC CAPE COD	\$50.00	Final Processing
9/19/2019	HABITAT FOR HUMANITY INTERNATIONAL INC CAPE COD	\$5,000.00	Final Processing
5/11/2019	AMERICAN ASSOCIATION OF ZOO KEEPERS SAINT LOUIS ZOO	\$500.00	Check Vailed
4/1/2019	COMMUNITY HEALTH CENTERS OF BURLINGTON INC	\$850.00	Check Mailed
3/8/2019	SEATTLE CHILDRENS HOSPITAL	\$335.00	Check Mailed

Is your profile complete?
Don't miss timely notifications and tips.
Review your profile to confirm current
contact information.
[Update your profile now](#)

The screenshot shows the 'Enter grant details' form. It starts with a 'Charity list' section where a grant is recommended to HABITAT FOR HUMANITY INTERNATIONAL INC for \$5,000.00. The total amount for the grant list is \$5,250.00. The form then moves to 'Allocate funds' and 'Confirm & submit' steps. A sidebar on the right provides details for the selected charity, including its name, address, and a note that it won't be permanently added to the charity list until the grant recommendation has been submitted.

1 > Enter grant details

Your grant list: (2)
\$75,850.16
Available to grant

Charity	Amount
HABITAT FOR HUMANITY ...	\$5,000.00
HABITAT FOR HUMANITY ...	\$250.00
Total	\$5,250.00

2 > Allocate funds

3 > Confirm & submit

Charity list
Recommend a grant to one or more of your favorite charities.
[Add a new charity](#)

Search your list
Viewing: Last 2 years

NEW!
HABITAT FOR HUMANITY INTERNATIONAL INC
HABITAT FOR HUMANITY INTRNL PARENT
Charity details

This charity won't be permanently added to your charity list until your grant recommendation has been submitted.

Amount: \$5,000.00
Use: Thanks for everything!
Acknowledgement: Name and Address
Timing: ASAP
[edit](#) [Added](#)

HABITAT FOR HUMANITY INTERNATIONAL INC
CAPE COD
Charity details

Amount: \$250.00
Use: Annual gift
Acknowledgement: Name and Address

92% of grants are recommended online

Summing it all up: How Fidelity Charitable donors give



Give strategically



Give actively



Give locally

Reaching DAF donors

6 tips and techniques for nonprofits



Tip

Recognize donors for DAF giving

And tag the correct donor in your database!

97%

of grants go out with donor information

FIDELITY Charitable
Make more of a difference

P.O. Box 770001
Cincinnati, OH 45277-0053

ENV 70100049
AMERICAN NATIONAL RED CROSS
SHARED SERVICES CENTER
P.O. BOX 37243
WASHINGTON, DC 20013

April 29, 2013

Dear Colleague:

Enclosed is a check in the amount of \$50.00. This Fidelity Charitable grant is made possible through the generosity and recommendation of the Trevelyan Fund, a donor-advised fund.

Designation: Where it's needed most.

Grant Terms: No goods, services or more than incidental benefits may be provided in exchange for this grant. This grant may not satisfy a legally enforceable obligation/pledge. This grant may only support purposes deemed by you to be 100% tax deductible.

You may choose to thank the donor, but please do not issue a tax receipt to either Fidelity Charitable or the recommending donor(s) for this grant. The donor received a tax receipt at the time they contributed to Fidelity Charitable. You can send your acknowledgment to the recommending donor(s) issued below.

Test Account
c/o Suzanne Keckane
200 Seaport Blvd.
ZEEB
Boston, MA 02210

PLEASE FOLD AND DETACH AT REFORMATION BEFORE PRESENTING TO CHECK FOR PAYMENT

FIDELITY CHARITABLE GIFT FUND
P.O. Box 770001
Cincinnati, OH 45277-0053
800-952-4438

PAYABLE AT: THE BANK OF NEW YORK MELLON
EVERETT, MA 02149
02-252113

3713905
April 29, 2013

E	F	G	H	I
Grant Amount	Special Purpose	Giving Account Name	Addressee Name	Acknowledgement Address Line 1
100	Designation: Disaster Relief Efforts	ABC Family Charitable Fund	Mr. Joe Smith	101 ABCD Ct.
400	Designation: Where it's needed most	XYZ Charitable fund	John Doe	222 XYZ St.
200	Designation: Tithe	Singh Giving Fund		

Fidelity Charitable grant communications

Habitat for Humanity
We build strength, stability, self-reliance and shelter.

Jeremy Krout-Ordover, CFRE
Vice President, Individual Giving
(604) 979-3849
jkroutordover@habitat.org

March 21, 2018

Dear John,

Thank you for your generous contribution in the amount of \$100.00 to Habitat for Humanity given through Fidelity Charitable Gift Fund. When families partner with Habitat for Humanity, their lives transform. Alongside volunteers and members of their community, they raise the walls of their new home – and a brighter future becomes closer than ever. With an affordable mortgage, parents can save more effectively, invest in education and find better jobs. In a decent home in a safe community, children can thrive.

Every family needs a secure place to call home and your support gives habitat homeowners a hand up to improved health, financial stability and success. We are so grateful for your commitment to helping those in urgent need of affordable housing. Your support makes this possible.

Your gift helps people like LaRutha and her four children. She faithfully paid her rent on time every month, but when her landlord failed to pay his mortgage, she came home to a notice taped to her front door: "Foreclosed. You have 24 hours to vacate." Imagine what moving from hotels to run-down apartments to friend's couches does to a child's sense of stability. "I looked at my kids and I did not have an answer for them as to where we were going to stay or when this was going to end." That is why she felt such relief when she discovered Habitat for Humanity. With your help, she and families like hers are able to raise their children in a safe, affordable home where they can thrive.

Thank you for your commitment to changing lives through decent, affordable housing. We couldn't build strength, stability and self-reliance for families like LaRutha without your generosity. If you have questions, please contact Mary Helen Martin at 404-420-3606 or by e-mail at mmartin@habitat.org.

In partnership,

Jeremy Krout-Ordover
Jeremy Krout-Ordover, CFRE
Vice President, Individual Giving

Thank you!

Administrative Headquarters | 270 Peachtree St. NW, Suite 1300, Atlanta, GA 30303-0263 USA
International Headquarters | 121 Habitat St., Americus, GA 31709-3498 USA (229) 924-6935 toll-free (800) 422-4828 fax (229) 928-8811 habitat.org

Thank you letter—without a tax receipt



Tip

Steward DAF donors in a way that invites deeper engagement

DAF donors set aside time and money for giving

September 2019

Harry Potter
Potter Family Gift Fund
123 Main Street
Boston, MA 12345

Dear Mr. Potter,

It is my privilege to submit this report to the Potter Family Gift Fund on behalf of St. Jude Children's Research Hospital®. Your generosity is helping us improve the lives of children battling cancer and other life-threatening diseases through pioneering research and family-centered care.

Thanks to the support of the Potter Family Gift Fund, our researchers and clinicians work tirelessly to help children defeat their illness and thrive into adulthood.

Rehabilitation Services at St. Jude

The physical therapists who work with Bridget are part of the St. Jude Rehabilitation Services program. The team is committed to helping our patients enjoy the highest quality of life possible.

Cancer and other deadly diseases, as well as the therapies used to treat them, can slow normal development in children or cause physical impairments. Some St. Jude patients have side effects from treatment and must regain skills, while others, like Bridget, need therapy to adapt to long-term changes in their abilities.

Since each condition is unique, it takes the expertise of the interdisciplinary team to develop a systematic, comprehensive treatment plan for each child. The St. Jude Rehabilitation Services



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Thanks to the support of the Potter Family Gift Fund, our researchers and clinicians work tirelessly to help children defeat their illness and thrive into adulthood.

her, helping her regain strength quickly. Just a month after, Bridget had her first prosthesis and she was even jogging on a treadmill three months post-amputation. It's simply amazing!"

Bridget is an athletic 7-year-old who enjoys riding bikes and being outside get back to all of those things, and it's because of the doctors and the treatment that she is getting at St. Jude," said Jamie.

for children like Bridget, to help them thrive despite their challenging circumstances.

On behalf of everyone here at St. Jude, I thank you for part of the best it can be for children battling cancer and other life-threatening diseases.

Sincerely,

Josh Bailey
Liaison, Foundation Relations

P.S. I would be happy to learn more about your specific funding goals, or to help arrange a site visit to St. Jude to see firsthand how your support is making a difference for our children. Please feel free to contact me at [redacted] or [\[redacted\]@stjude.org](mailto:[redacted]@stjude.org).

P.S. I would be happy to learn more about your specific funding goals, or to help arrange a site visit to St. Jude to see firsthand how your support is making a difference for our children. Please feel free to contact me at [redacted] or [\[redacted\]@stjude.org](mailto:[redacted]@stjude.org).



Tip

Encourage donors to take advantage of DAF features

Fidelity Charitable donors:

25%

Of donor grants are pre-scheduled

42%

Have a bequest or legacy giving vehicle²



St. Jude patient Lea and her brother Theo

Make Your Wishes Known

Generous supporters like you who want to continue their support in the future often include gifts to St. Jude in their wills and estate plans.

After making provisions for family and other loved ones, giving "what's left" to St. Jude does not affect your family's future security. Your attorney can easily include such language in your will and/or other plans, if you wish.

Other ways to give

Your will is not the only tool you can use to make a gift of the remainder of your estate. You may have other assets that allow you to give a remainder gift such as:

- **Life insurance.** You can name St. Jude as a final beneficiary of a life insurance policy.
- **Retirement plans.** It's easy to include St. Jude as a beneficiary of your retirement plan assets.
- **Living trusts.** If you use a living trust to distribute some of your assets, you can include St. Jude.
- **Donor advised funds (DAF).** You may designate St. Jude as a beneficiary of any remaining DAF assets.

An attractive feature of all these plans? None is a permanent designation. You can feel free to arrange

your "gift of a lifetime" knowing that it can be changed at any time.

An example*

Janice is reviewing her will because her husband, Henry, passed away. She and Henry had no children but were close with their five nieces and nephews. They also enjoyed showing their support for St. Jude by contributing monthly as Partners In Hope for many years.

During her review, Janice decides to keep the gifts in her will that she and Henry planned for their nieces and nephews. She also decides to leave all of what remains in her estate to St. Jude and two other favorite charities. This allows her to give what's left to the kids at St. Jude, and her other charities, after first providing for her family.

Adding a gift to St. Jude through your will, trust or a beneficiary designation can be a wonderfully generous result of reviewing your estate plans. For more information about including St. Jude in your plans, return the enclosed reply card, call 1-800-395-1087 or visit stjude.org/yourlegacy.

**For illustrative purposes only.*

Childhood Cancer
Awareness Month

SEPT



Tip

Integrate DAFs into existing marketing materials

Add DAFs as another way to give

PAN-MASS CHALLENGE

RIDE VOLUNTEER FUNDRAISE ABOUT US COMMUNITY

WAYS TO GIVE

- Giving Is Easy
- Online
- Check
- Donor Advised Funds
- Matching Gifts
- Stock Donations
- IRA Donations
- Planned Giving - PMC Legacy Society

Donor Advised Funds

Donor Advised Funds (DAFs) are very effective charitable giving vehicles whereby donors set aside money to be granted to charitable organizations. You can support a PMC rider with a DAF grant. When processing a DAF grant through a charitable giving account, search for the PMC by tax ID (04-2746912). The PMC typically receives DAF grant checks within two weeks and credits a rider's fundraising immediately upon receipt.

Fidelity Charitable DAF grants can be initiated by clicking on the DAF button on the donation checkout page. Learn more about DAFs in the [Fidelity Charitable Giving Report](#).

Matching Gifts

Matching Gifts

Double your donation! When applying for a company match, search for the PMC by tax ID (04-2746912). Complete your company's online process or send paper matching forms with your check or online donation receipt to the PMC office at 77 4th Ave., Needham, MA 02464. Once we confirm receipt of the original donation, we apply the match to the rider's fundraising account.

In addition to matches, many employers have grant programs based on volunteer hours or other criteria.

Make a difference today

Support Habitat now through a **donor-advised fund, or DAF**, a charitable giving program that allows you to:

- donate cash, stock and other assets
- receive an immediate tax deduction
- continue giving over time

DAFs are a flexible and easy way to give. Assets grow tax-free, allowing you to have even more impact for families in need of affordable housing.

Give today. Contact your DAF advisor, or donate online at nabitat.org/support/donor-advised-funds

St. Jude Children's Research Hospital

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

Give through your donor advised fund to quickly, simply and can help transform the future for St. Jude patients.

[Grant from Your Financial Institution or Foundation](#)

[Learn More About Donor Advised Funds](#)

What is a donor advised fund (DAF)?

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

How do I give through a donor advised fund?

You can give in two ways:

- 1. Recommend a DAF through your financial institution or foundation**
 - You can recommend a gift through your financial institution or foundation by contacting them or granting online (where applicable).
 - The grant will arrive at St. Jude Children's Research Hospital, or another charity you name, with only the fund's name and address on it (unless you request otherwise).
- 2. Contact your fund manager**
 - Call your fund manager and recommend a charity that you would like to support, such as St. Jude Children's Research Hospital, and how much the grant should be.
 - The fund manager will send a check directly to St. Jude, or another charity you name, from your fund.

Already have a donor advised fund?

Click on your financial institution or foundation below and log in to your account to begin granting to St. Jude. For official name, mailing address and tax information, please see above.

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



Tip

Integrate DAFs into existing marketing materials

Add DAF Direct as a donation option

PAN-MASS CHALLENGE

Search for a Rider or Team | Calendar | Store | FAQ | Contact | Log In

PMC

View PMC Winter Cycle profile

Why I Ride ...

July 2019

It may be ju

This will be where I have usually app and I am in far it has no

TJ, our first Read More

SUPPORT MY RIDE

\$1,000 \$250 \$60

\$500 \$120 \$30

Donate Any Amount

DONATE FROM YOUR

Fidelity Charitable DAF

Giving Account®

Number

Balance \$3,297.65

Account Giving

Recommend a Grant to

PAN MASSACHUSETTS CHALLENGE TRUST

Amount \$ 0.00

Designation PMC Rider

Timing As soon as possible

Acknowledgment Harry Potter 123 Main Street Boston, MA 12345

PREVIEW

DAF DIRECT

Give from your **donor advised fund**



Tip

Help us get you funds faster

1. Check your address in the IRS database

HABITAT FOR HUMANITY INTERNATIONAL INC
HABITAT FOR HUMANITY INC
Tax ID 46-0781264 | [Research charity](#)

322 W Lamar S
Americus, Georgia 31709 - 3543

[Add this charity](#)

2. Sign up for EFT online – it only takes 3 steps!

FIDELITY Charitable™
Make more of a difference

Charitable Organization Electronic Funds Transfer Enrollment Form

This form is ONLY for authorized contacts from IRS-qualified public charities who receive grants from Fidelity Charitable by electronic funds transfer (EFT).

Please note that the form must be submitted with an image of a voided check, a deposit slip, or a bank letter for your nonprofit organization to complete registration.

Organization's official name

Employer Identification Number (EIN)

What type of account does the organization have at this financial institution?

☐ A checking account

☐ A savings account

Which of the following will you provide to enroll your organization for EFT?

☐ I will provide a voided check or deposit slip with the account and routing number

☐ I will provide a bank letter

Please provide the name and contact information for an individual who will be notified via email when your organization receives a grant from Fidelity Charitable and will receive grant detail reports.

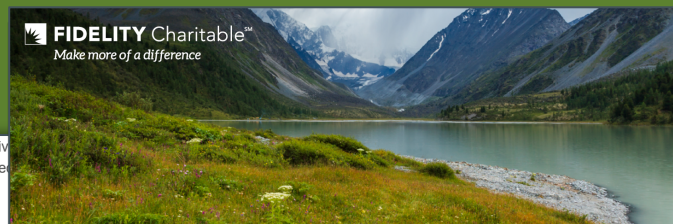
Contact 1

Contact name

Title

Daytime phone number (include extension, if applicable)

Email address



What to expect once your organization is enrolled in EFT

When you receive your first grant via electronic funds transfer (EFT), you will receive an email notification. This email includes a link to your **Grant Detail Report**, which is encrypted for security purposes. To access the report, click on the html attachment link in the body of the email.



Tip

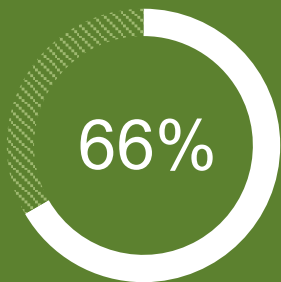
Help donors understand your mission and programs

DAF donors engage with nonprofits to learn more about their work

GET READY TO BOOST YOUR GIVING IQ

Nine Questions You Should Ask Every Nonprofit

A guide to help you choose the
right nonprofits



of DAF donors conduct
research before supporting
new nonprofits

Questions DAF donors may ask:

- What is your most successful program and why?
- What are areas of opportunity for your organization?
- Where does most of your funding come from?
- What are your most urgent needs?
- How do you keep your supporters up to date about your work?



Summing it up

1

Recognize donors for DAF giving

Take the donor's contact information from the grant communication and thank them, not us!

2

Steward DAF donors in a way that invites deeper engagement

DAF donors set aside time and money for giving

3

Encourage donors to take advantage of DAF features

Donors can easily maintain giving and create a legacy

4

Integrate DAFs into existing marketing materials

Include DAFs alongside other ways of giving

5

Help us get you funds faster

Sign up for EFT to streamline grant the grant process

6

Help donors understand your mission and programs

DAF donors engage with nonprofits to learn more about their work

Thank you!

Tell us what you thought!
Use our special hashtag,
#DAFDonors

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<https://webinars.nonprofitquarterly.org/products/leading-edge-membership>



Sponsored by



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