

Recommend a Grant

AEF offers a password-protected online Granting Portal at [AEFonline.org](https://www.aefonline.org). Individuals with granting privileges will have access to the donor-advised fund from the portal site. Grants should be recommended using the online Granting Portal to increase efficiency and reduce processing time. Grant history and other useful information may also be found on the site. Grant requests will not be taken over the phone. The following grant recommendation process generally takes place within 5 to 10 days.

Step 1



The donor or their authorized individual submits an online grant recommendation through the online Granting Portal at [AEFonline.org](https://www.aefonline.org). If the donor wishes to include additional information in the grant letter to the charity, there is an opportunity to provide it in the **Donor Purpose Statement** portion of the **Grant Details** section.

Step 2



Once the grant recommendation is received, AEF completes a due-diligence process, which includes verifying the charity's eligibility based on IRS and AEF guidelines and validating the purpose of the grant.

Step 3



Upon completion of the due-diligence process, AEF sends a letter of authorization (LOA) to transfer funds to the financial advisors' designated recipient on file at AEF.

Step 4



The financial advisor transfers the funds via ACH or wire to AEF.

Step 5



AEF will issue a grant letter to notify the charity that a grant has been paid to them.

For more details, see AEF's Granting Policy at [AEFonline.org/policy-statements](https://www.aefonline.org/policy-statements).