

American Endowment Foundation (AEF)

Let's Talk DAFs



MEET AEF

One of the nation's largest independent donor-advised fund (DAF) sponsors.

AEF helps donors achieve their philanthropic goals.



WHAT IS OUR EXPERTISE?

DAFs, one of the fastest-growing charitable giving options in the country.

A DAF allows individuals to donate, receive an immediate tax benefit, recommend investments to potentially grow the assets, and recommend grants to eligible charities from the fund over time.

DAFs can accept a wide range of contributions –from cash and publicly traded securities to more complex assets like illiquid or alternative investments.

THE AEF DIFFERENCE

As a cause-neutral sponsor, we offer an unbiased approach to giving—allowing for more freedom to recommend 501(c)3 charities for grants.

Donate

AEF is a 501(c)3 public charity. Donors receive a tax benefit when they donate to us.

Invest

Think of an AEF DAF as a charitable account. Gifted assets are invested by AEF-approved financial advisors recommended by AEF donors.

Grant

As an unbiased administrator, AEF does not prohibit grants based on geographic, religious, or other categories. Donors can recommend grants to IRS-qualified public charities.

AEF allows successor donor advisors to be named, allowing a charitable legacy to live on generationally.

Donations since AEFs Inception

\$12.5B

MAKING A POSITIVE IMPACT

Our ability to provide a best-in-class client experience within the financial services industry extends to:



Through DAFs, not just as financial tools, but as powerful catalysts for change, donors can contribute strategically and align their vision with significant support through charitable giving. Together, we can shape a brighter future through the transformative and lasting power of philanthropy.

HOW WE APPROACH EXPANDING PHILANTHROPY

AEF forges strong partnerships with financial advisors and firms.

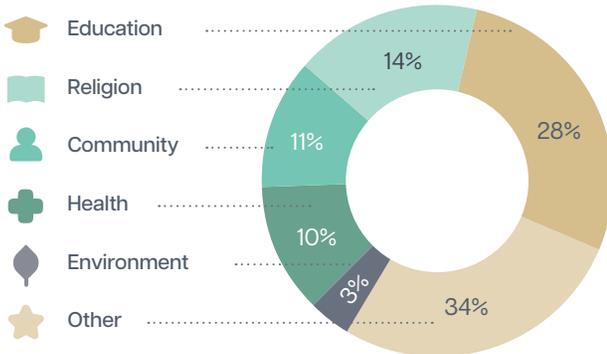
Recognizing the personal nature of charitable giving, we engage with investment professionals and wealth advisors to enhance the power of philanthropy.

OVER
111K
GRANTS IN 2024

IN 2024
78%
OF FUNDS MADE GRANTS

AEF by the Numbers

AREAS OF IMPACT



Results based on grant value.

Distinct Charities Supported in 2024

MORE THAN

34,000

AS OF DEC 31, 2024

Average DAF	Median DAF
\$524,000	\$94,000

Share of DAFs Less Than or Equal to \$100k

52.7%

Grants per Business Day in 2024

\$5.2M

States with Charities Granted in 2024

50

Average Grant

\$11,700

Median Grant

\$1,000

Number of Grants in 2024

111,646

Common DAF Misunderstandings

There are common misconceptions that need to be debunked.

01 DAFs are only for the wealthy.

Not only do many DAF sponsoring charities offer low minimum contributions, the median overall DAF size of about \$50,000 suggests it's not just a tool for megadonors.

02 DAFs sit on funds and don't support charities.

DAF sponsoring charities invest donated funds, all of which are irrevocably dedicated to charitable purposes. The average payout rate for DAF sponsors is consistently over 20 percent, and most have inactive account policies to encourage donors to make gifts consistently.

03 DAFs are mainly a tool for donors to hide their identity.

DAF grantmaking can be private, and in many cases for specific reasons like safety or avoiding excess solicitations, but most DAF donors opt against remaining anonymous.

04 The timing of DAF grantmaking follows similar trends in charitable giving.

DAF grantmaking is more consistent than direct charitable giving. While the latter is concentrated at year's end, grants from DAFs are spread throughout the year, allowing charities to maintain steady funding and donors to respond quickly to increased needs or times of crisis.

05 Donors can receive a personal benefit from the assets in their DAF.

There are laws in place prohibiting donors from receiving personal benefits from DAFs and other charities. All DAF gifts are irrevocably dedicated to a charitable purpose.

06 Limiting the use of DAFs would shift giving directly to non-DAF charities.

DAFs are especially useful for making complicated giving easy (e.g., donating privately held stock or real estate). Without DAFs, certain charitable gifts would be smaller, and others wouldn't be made at all.