



DAF Giving Guide

Your source to streamline
the DAF process.

Whether you're looking to open a new DAF, add funds to an existing one, or make a grant recommendation, let's expand philanthropy.



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Open a new DAF with an investment account

Step 1

Download our Program Description and review.



[Click to Download](#)

Step 2

Download the Summary for Financial Advisors document.



[Click to Download](#)

Step 3

Access Partner Gateway. (Be sure you sign a discretion statement, and your client signs the DAF application.)



[Click to Visit](#)

Step 4

Download the DAF checklist and follow the steps.



[Click to Download](#)

Start the DAF application now > [Go to Partner Gateway](#)

AEF is the sole legal owner of all investment accounts and assets that make up a DAF. Therefore, our express written authorization is required prior to moving any DAF funds.





Add funds to an existing DAF

Step 1

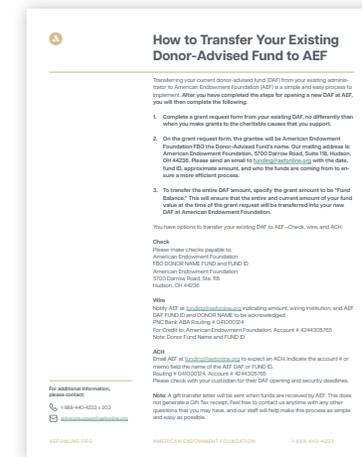
Download the Contribute to the Fund document for contribution options.



Click to Download

Step 2

If you're transferring from another sponsor, download the How to Transfer Your Existing DAF to AEF document.



Click to Download





Recommend a grant

Step

1

Download the Make a Grant in DonorCentral document.



[Click to Download](#)

Step

2

Watch the Grant video for details.

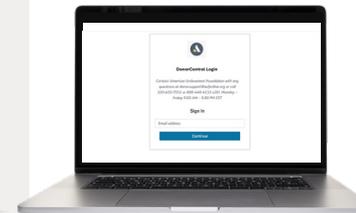


[Click to Watch](#)

Step

3

Go to DonorCentral to make a grant.



[Click to Visit](#)

Step

4

Watch our DonorCentral tutorial for navigation support.



[Click to Watch](#)

Questions? Reach out.



Advisor

Phone: 1-888-440-4233 x203

Email: advisorsupport@aefonline.org

Donor

Phone: 1-888-440-4233 ext. 201

Email: donorsupport@aefonline.org





Things to remember

1. Any DAF opened after December 1 can be granted in the following year.
2. Include the Fund ID on all communications sent to AEF.
3. To safeguard donors and ensure adherence to AEF policy, IRA distributions are not permitted to be directly deposited into a Donor-Advised Fund (DAF) during the donor's lifetime.

New gifts to AEF must be submitted with an AEF DAF application. Additions must be submitted with the FUND ID and donor acknowledgment name to American Endowment Foundation:

CHECK

Checks must be USPS postmarked by December 31, 2025, and sent directly to American Endowment Foundation. Please check with your local post office for hours of operation. We encourage using certified mail to track receipt of mailed gifts.

Please make checks payable to:
American Endowment Foundation
FBO Donor Fund Name and FUND ID
American Endowment Foundation
5700 Darrow Road, Ste. 118
Hudson, OH 44236

WIRE

Notify AEF at funding@aefonline.org, indicating amount, wiring institution, and AEF Donor-Advised Fund FUND ID and DONOR NAME to be acknowledged. AEF recommends sending your wire prior to December 29, 2025.

PNC Bank ABA **Routing #041000124**
For Credit to: American Endowment Foundation,
Account # 4244305765
Note: Donor Fund Name and FUND ID

ACH

Notify AEF at funding@aefonline.org to expect an ACH. Indicate the account # or memo field the name of the **AEF Donor-Advised Fund or FUND ID**. AEF recommends sending prior to December 29, 2025.

Routing # 041000124
Account # 4244305765

Please check with your custodian for their DAF opening and security deadlines.





Let's get started



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