DAF Myths & Facts

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Myth #1:

An **effective fundraising strategy is to solicit donors based on the tax vehicle** they use, such as Private Foundations, Trusts and donor advised funds (DAFs).

Fact #1:

Remember that ***People give to People***. You need to reach out to the individual, not the vehicle. Use major gifts campaign strategies/tools.

Myth #2:

DAFs **never release the identity** or contact information of their donors.

Fact #2:

Create **records for the fund holder** and capture all of the donor information provided by the DAF. Look at the DAF's Annual Report.

Myth #3:

Fund holders give up significant control as to where grants are directed, and the DAF sponsor promotes charities it favors.

Fact #3:

DAFs may issue grants to any qualified **501(c)(3) Public** Charity. A grant may not be made if there is an exchange of goods and services.

Myth #4:

DAF fund holders **cannot sign gift agreements**.

Fact #4:

The DAF sponsor will work with you to create an agreement that works for the charity, protects the donor, and meets the legal requirements.

Myth #5:

DAFS **cannot continue your charitable legacy** because the sponsor, not your heirs or your favorite charity, takes the residual assets in the fund.

Fact #5:

Research the policies of the DAF used by your donor, and reach out to the staff re: how to execute a deferred gift to your charity.

Questions

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