



## Donor-Advised Funds (DAFs): A 60-Minute Setup Checklist

**Goal:** Make DAF giving visible, simple, and repeatable in one hour. Use the checkboxes as you go; keep the copy blocks as-is (swap in your legal name and EIN).

### 0-10 minutes: Prep the essentials

- ☐ Confirm **legal name:** \_\_\_\_\_
- ☐ Confirm **EIN:** [##-#####]
- ☐ Decide your default phrasing: **"Give from your donor-advised fund (DAF)"**
- ☐ Assign an owner for this checklist: **Name:** \_\_\_\_\_

### 10-25 minutes: Update the donation form

- ☐ Add a **DAF option/line** near the main payment buttons.
- ☐ Place a short helper line directly beneath it.
- ☐ Add a small note to the **confirmation page/receipt** with your legal name and EIN.

### Paste-in copy (donation form)

**Button/label:** *Give from your donor-advised fund (DAF)*

**Helper line (under it):** *You can recommend a grant from your DAF in a few steps.*



## Paste-in copy (confirmation page/receipt)

*Prefer a DAF grant? Search for **[Org Legal Name]**, EIN **[##-#####]** in your fund portal.*

(If you're on RallyUp, add the helper line in the page description and the note in your confirmation email template.)

## 25-35 minutes: Add a "Ways to Give → DAF" block

- ☐ Create a short section explaining **what a DAF grant is** and **how to recommend one**.
- ☐ Include your legal name, EIN, and a contact email for questions.

## Paste-in copy (Ways to Give)

*Donor-advised fund (DAF) gifts are welcome. In your DAF portal, search for **[Org Legal Name]**, EIN **[##-#####]**, and recommend a grant to support our work. Questions? **[contact@org.org]***

## 35-45 minutes: Set up acknowledgments

- ☐ Save a **DAF thank-you email** template (impact-first, no tax-deductible language to the donor).
- ☐ Note that the **formal receipt** goes to the sponsor; the **warm thank-you** goes to the recommending donor when details are provided.



## Paste-in copy (thank-you email, ~80 words)

*We sincerely thank you for recommending a grant from your donor-advised fund to **[Org]**. Your support moves this forward immediately: **[1 specific action this month]** and **[1 short outcome by date]**. We'll share a brief update in about 30 days. If it's convenient, you can set a monthly or quarterly recommendation in your DAF portal. Our legal name is **[Org Legal Name]**, EIN **[##-#####]** for your notes.*

*We're grateful for your continued support.*

## 45-55 minutes: Tag in your CRM

- ☐ Create a tag/field: **Source = DAF** (for gifts) and **DAF\_Prospect = Yes** (for people who click/mention DAF).
- ☐ Save a segment: **Has DAF indicators** (so you can reach them later).

## 55-60 minutes: Quick test

- ☐ Ask one teammate to follow the path (see the donate page, read the helper line, view the confirmation note).
- ☐ Fix any unclear wording on the spot.

## Keep handy (copy blocks)

### One-line email/footer:

*Prefer giving via your donor-advised fund (DAF)? We welcome DAF grants. Search **[Org Legal Name]**, EIN **[##-#####]**.*



**Event script (15 seconds):**

*If you give through a donor-advised fund, we welcome DAF grants; details (legal name and EIN) are on our donate page and in tonight's program.*

**Next week: 10-minute check**

- ☐ Did the DAF line get clicks or mentions?
- ☐ Did any DAF grants arrive? Send the template thank-you.
- ☐ Add one sentence to your next newsletter using the footer line above.