



Connecting with DAF donors

Insights & Tips



\$100B

Granted
since inception

352K

Donors

2024 HIGHLIGHTS

2.7M

Grants to 213,000
nonprofits

\$14.9B

Granted to nonprofits
(25% more than 2023)

Fidelity Charitable is an independent public charity established in 1991.
We are the nation's largest grantmaker.

Our mission is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective.

All data in presentation from Fidelity Charitable 2025 Giving Report unless otherwise noted

What is a donor-advised fund (DAF)?

A DAF is like a charitable investment account that a donor opens to support nonprofits



Many charitable organizations sponsor donor-advised fund programs

723 Community foundations

344 Single-issue nonprofits

73 National DAF sponsors

Making philanthropy more accessible

352K

Total donors

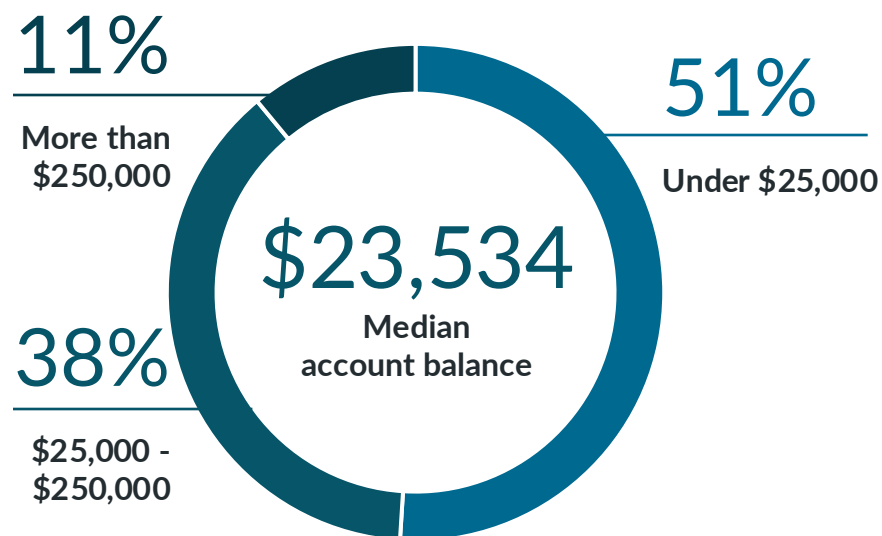
217K

Accounts

67%

say they gave more to charity than they would have without a DAF¹

Giving account balances



Active Grantmaking

12.3

Average # of grants per account

\$5.4K

Average grant size

88%

Of all accounts recommended a grant

¹ Fidelity Charitable, Powering Generosity: Why and How Donors Use Donor-Advised Funds, 2022

Grant distribution rates

Within 1 year of a \$100 contribution



Within 5 years of a \$100 contribution



Within 10 years of a \$100 contribution



Dollars granted to charity



Remaining dollars for grants

Meet a typical Fidelity Charitable donor

Thinking about the next phase of their life

55

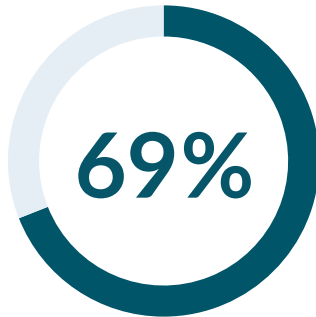
Average age when donors open an account

62

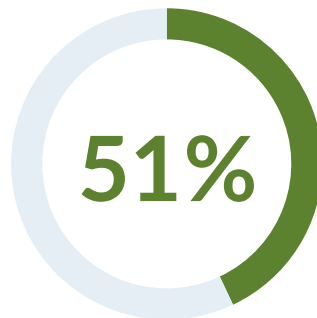
Average donor age



Giving financial support as well as time



Volunteer their time to charity¹



Volunteer 5 or more hours each month



¹ Fidelity Charitable, Powering Generosity: Why and How Donors Use Donor-Advised Funds, 2022

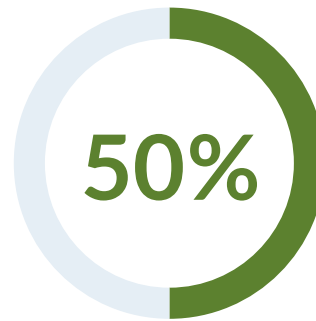
Why do donors use a DAF?

To optimize financial impact of donations, maintain a commitment to philanthropy today and tomorrow, or strategize for longer-term giving



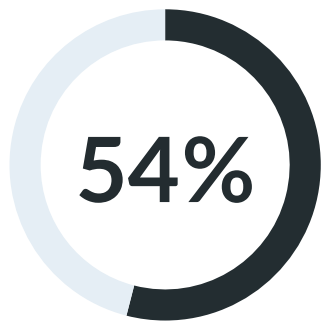
To optimize the financial impact of donations

- potentially minimize capital gains taxes
- bunch charitable contributions
- invest assets and grow charitable funds tax-free
- donate publicly traded stocks or mutual funds

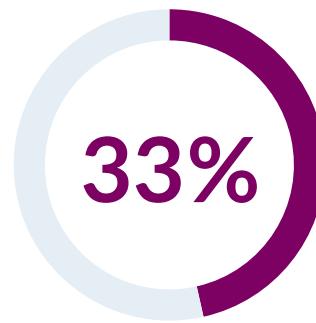


To maintain a commitment to philanthropy for the future

- estate planning
- sustaining giving in retirement
- creating a charitable legacy



To centralize giving into one hub and prioritize philanthropy



To establish a fund now while strategizing for long-term gifts

A group of diverse preschool children are shown in a close-up, smiling and laughing. In the foreground, a young girl with long brown hair and a pink headband is laughing heartily. Next to her, a young girl with dark hair and a pink jacket is also smiling. In the background, other children are visible, including a boy with a blue shirt. The overall mood is joyful and happy.

Donor-advised funds help donors amplify their impact

\$170,000 in additional funding helped

79 additional preschoolers

“

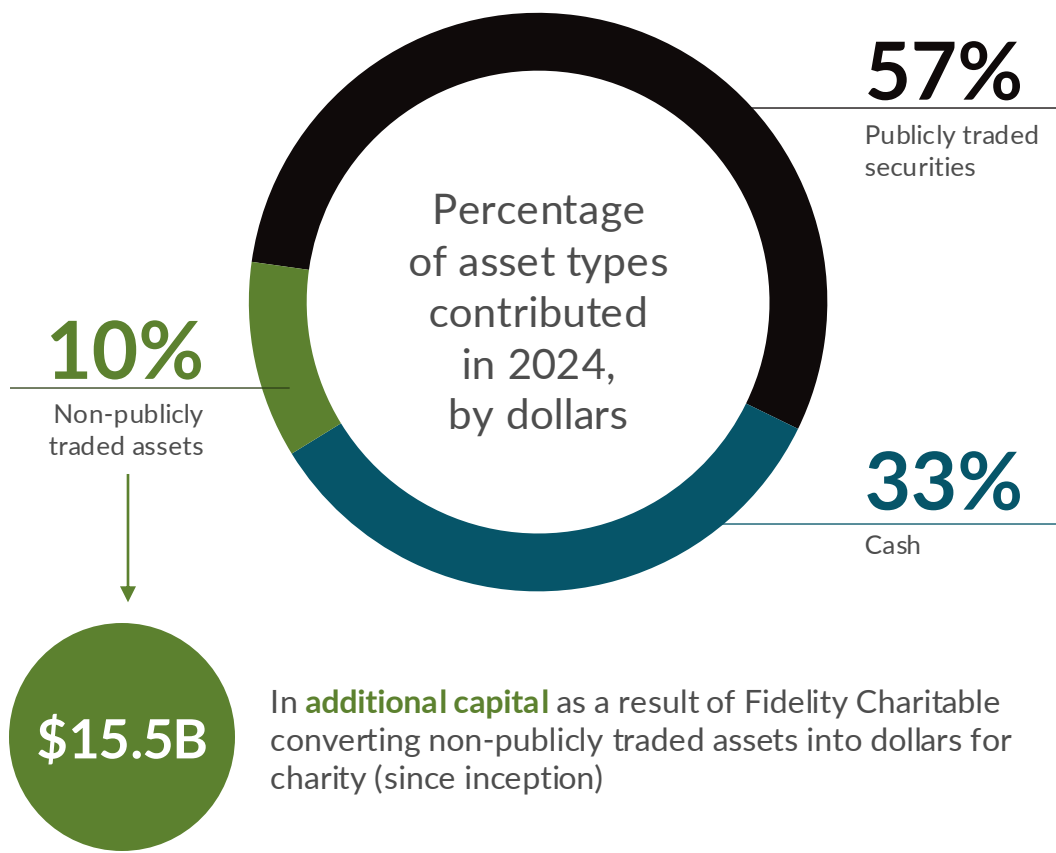
We didn't want to do one big gift and walk away. We wanted to find the area where our money could have the greatest impact over time.

-DAN FRANCIS

Fidelity Charitable Donor

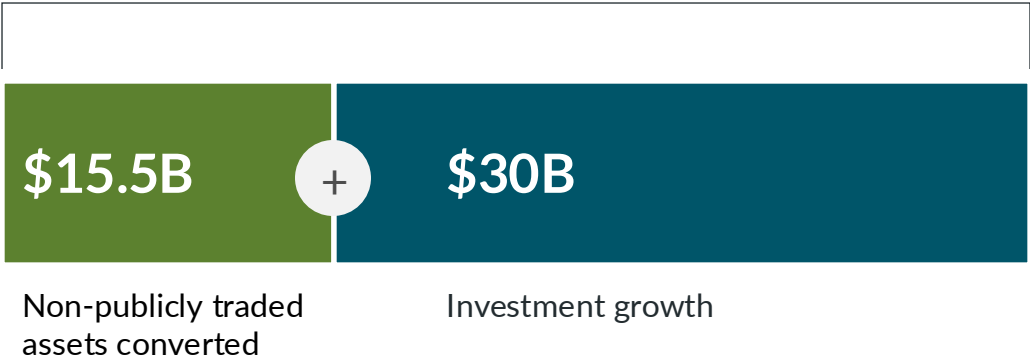
Increasing capital for the sector

Donors contribute a variety of non-cash assets



Unlocking and growing capital for good

\$45B Total additional funds Fidelity Charitable has created since inception



How do I reach DAF donors?

5 actionable tips for nonprofits



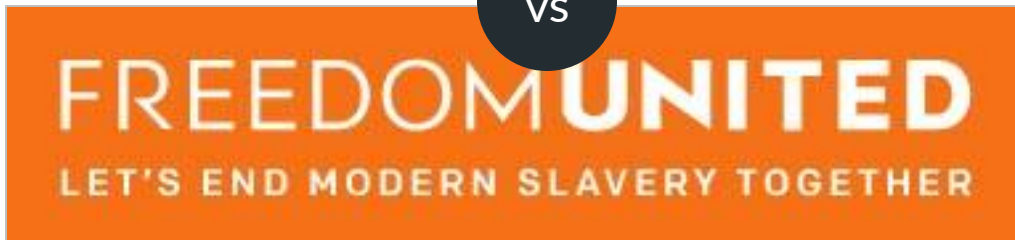


Tip 1: Make sure donors can find you

- Make sure the name you use matches what is registered with the IRS
- Make your tax ID number obvious on your website



VS



Make sure your information is current on donor resource sites like Guidestar, Charity Navigator and GreatNonprofits

The screenshot shows the Fidelity Charitable search interface. At the top, there's a search bar with the text 'Find a charity' and a magnifying glass icon. Below the search bar, the text 'Equal Justice Initiative' is entered. To the right of the search bar is a 'Help' link. Below the search bar, it says '1 result'. The result is for 'EQUAL JUSTICE INITIATIVE' with Tax ID 63-1135091. A red box highlights the 'Research charity' link, with a red arrow pointing to it. To the right of the result is an 'Add this charity' button. Below the result, it says 'This charity has provided Fidelity Charitable with a preferred way for receiving funds.'



Tip 1: Make sure donors can find you

Use our demo to see exactly how you appear to donors searching for charities

Access it here:

Fidelitycharitable.org/nonprofits

Our grant checkout defaults each grant to: “Where it’s needed most” with donor name and address

Find a charity

Equal Justice Initiative

1 result

EQUAL JUSTICE INITIATIVE
Tax ID 63-1135091 | Research charity

Add this charity

Amount: \$1,000.00

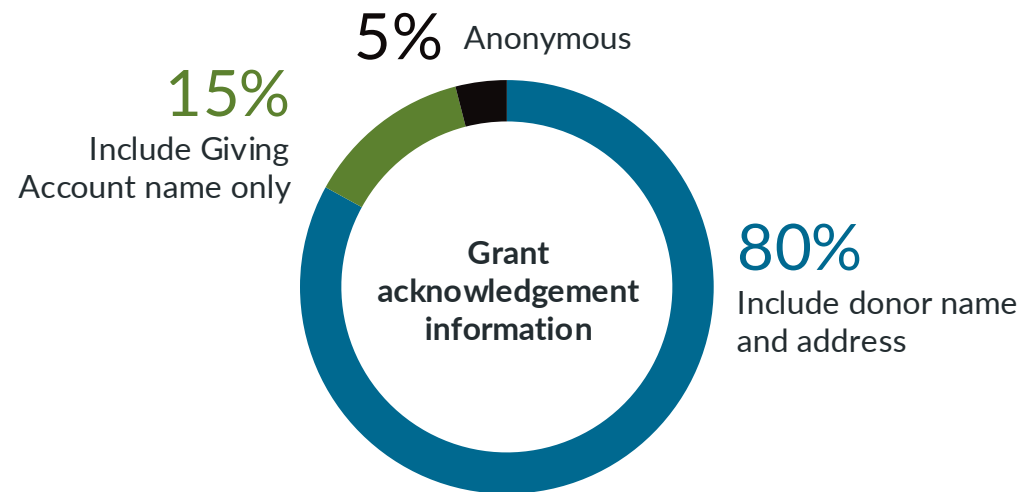
Use: Where it's needed most

Acknowledgement: Name and Address

Timing: ASAP

Add this grant

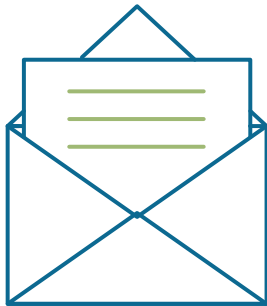
95% of grants include contact information





Tip 2: Recognize donors for DAF giving

- DAF donors could be some of your highest-capacity donors—be sure to tag them in your database
- Follow-up with a DAF-specific thank-you note
(Thank them, not us!)



Need help getting started?

Visit Fidelitycharitable.org/nonprofits

Find in-depth answers to questions like:

1. Where do I find donor information?
2. How can my nonprofit receive grants electronically?
3. I received a grant. How do I thank the donor who made the grant?
4. How can I make sure Fidelity Charitable can contact me about a grant recommended to my nonprofit?



Tip 3: Invite deeper engagement

- Once a donor has recommended a grant, invite them to speak with expert staff, tour your facility or see a program in action!
- Share the projects your organization is working on, highlighting recent achievements and identifying areas where support is most needed.



Boston Healthcare for the Homeless Project used an email outreach to invite donor Mike Bradley to tour the facility and speak with staff



Tip 4: Encourage donors to use the features of their DAF

- Pre-schedule grant recommendations
- Recommend recurring grants
- Name your organization as a successor on their account



Your donor-advised fund can help save lives

St. Jude patient Eleanor
blood cancer

Your donor-advised fund can help sustain the lifesaving work of St. Jude Children's Research Hospital®. Grant from an existing DAF, or better, establish a recurring grant to help save kids like Eleanor. Your generosity ensures that families never receive a bill for treatment, travel, housing or food—because all a family should worry about is helping their child live. Make an impact today by supporting our lifesaving mission: Finding cures. Saving children.®

stjude.org/DAF | (800) 910-3172

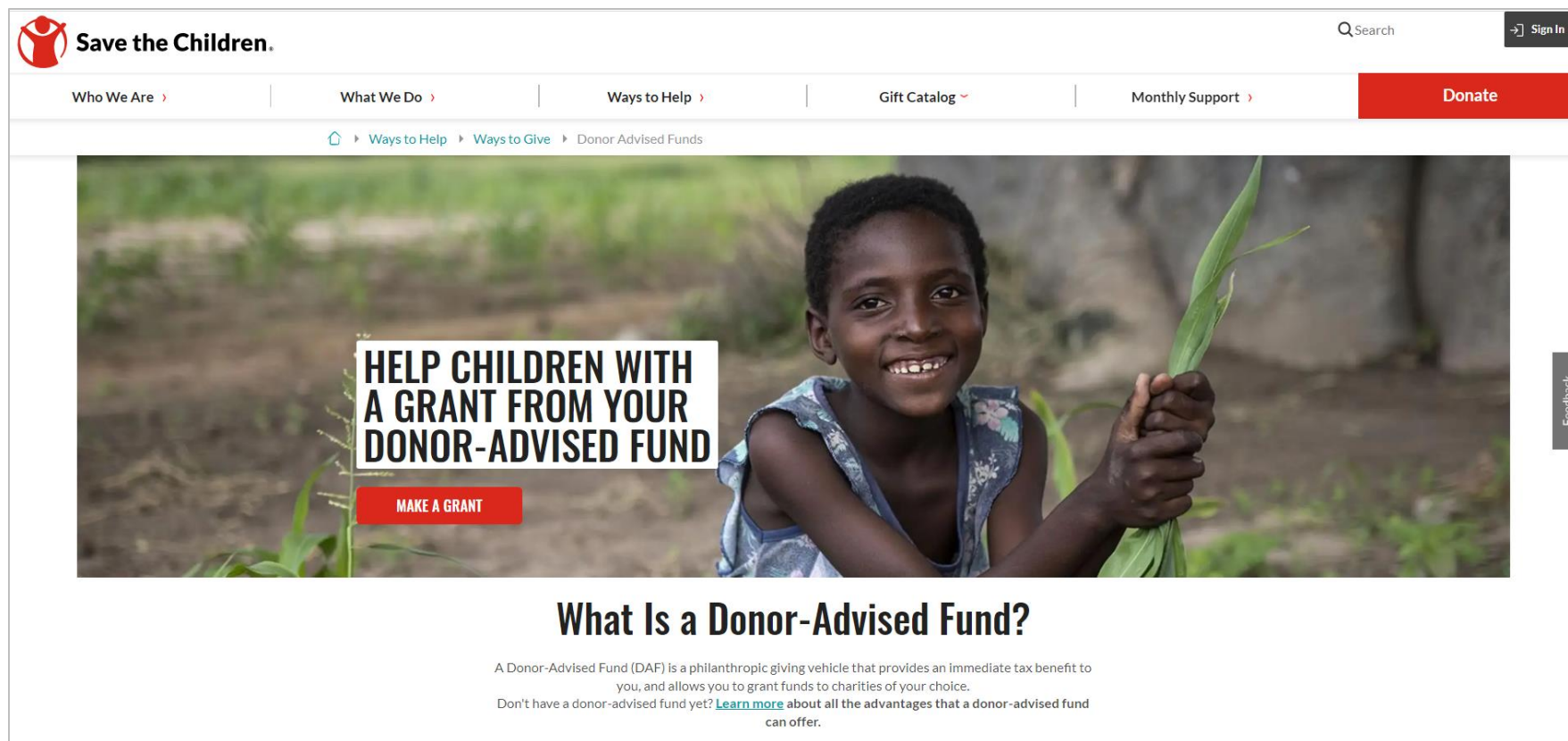


St. Jude Children's Research Hospital
Finding cures. Saving children.®
ALSC - DANNY THOMAS, FOUNDER



Tip 5: Integrate DAFs into your existing marketing materials

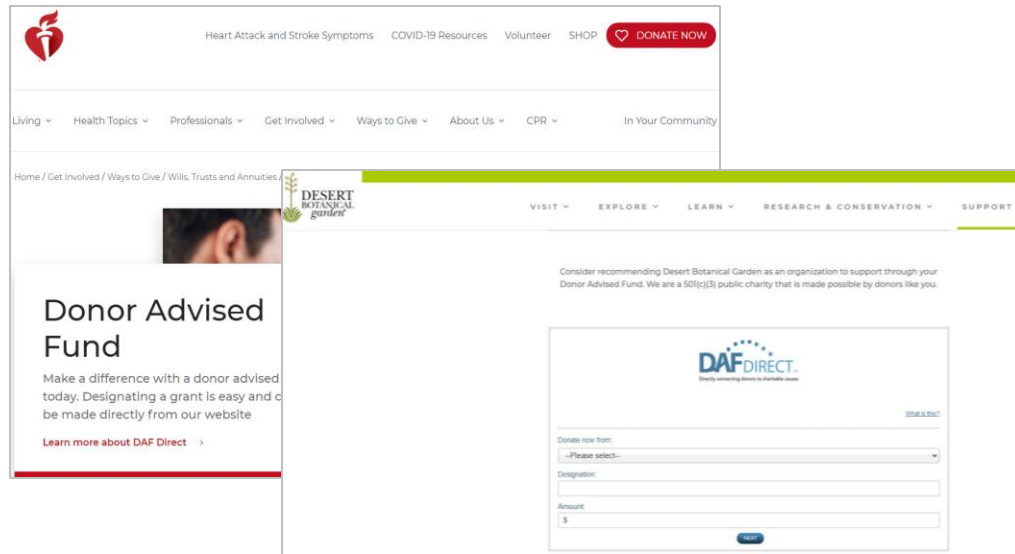
Start with your existing touchpoints: website and fundraising appeals



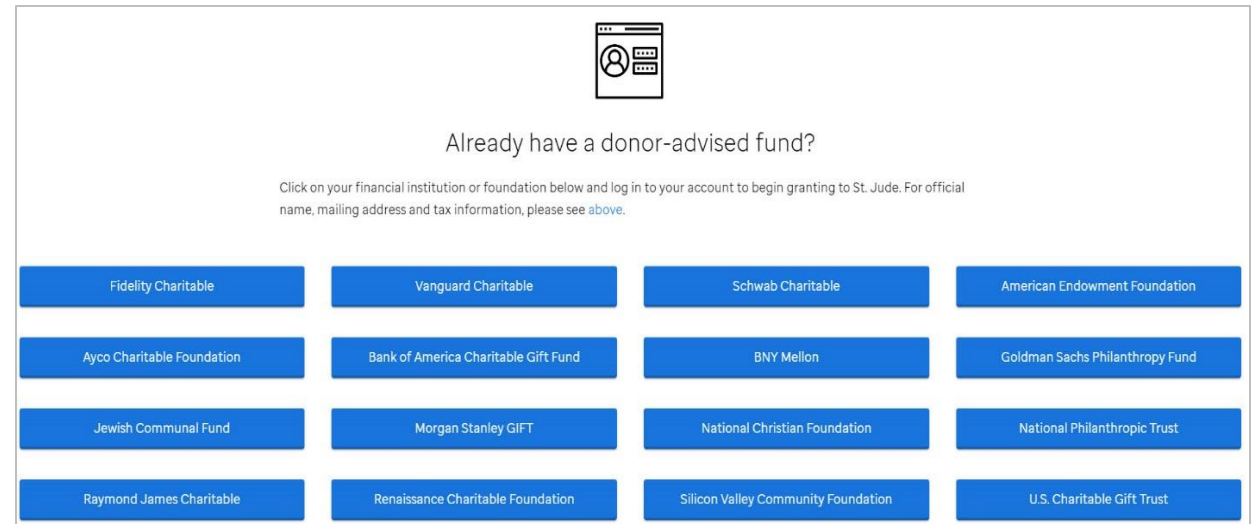


Tip 5: Integrate DAFs into your existing marketing materials

The DAF Direct widget (DAFdirect.org) allows DAF donors to donate right from your own website, or...



...link to the DAF sponsors your donors use most commonly on your site



Bonus Tip: Get grants faster with EFT!

Electronic Funds Transfer (EFT) directly deposits grants into your nonprofit's bank account



Fast



Easy



Secure



Free



Simple to enroll online at
fidelitycharitable.org/nonprofits

Enroll online



We've been able to focus more on our mission, less on the steps of processing contributions. This has enabled us to aid our community in a timely manner when they need it most.

-Catherine D'Amato, President and CEO
The Greater Boston Food Bank

Summing it up

1 **Make sure donors can find you**

Keep your information current with the IRS and donor resource sites and add your tax ID number to your website

2 **Recognize donors for DAF giving**

Tag them in your database and follow up with a DAF-specific thank-you

3 **Invite deeper engagement**

Invite donors to speak with a staff expert, tour your facility or see a program in action

4 **Encourage donors to use the features of their DAF**

Donors can schedule grant recommendations or name your organization as a successor

5 **Integrate DAFs into your existing marketing materials**

Include DAFs alongside other ways of giving

6 **Bonus tip: Enroll in EFT!**

It's fast, secure and free to get your grants directly deposited

Questions?



Thank you

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