

Checklist: Comparing Donor-Advised Funds

Funds Being Compared (Sponsors)		Amount to Donate
Fund A		
Fund B		
Fund C		

	Subject or Question	Fund A	Fund B	Fund C
	My Designees; Later On			
1	Can my spouse, children, grandchildren or others I name (“My Designees”) make grant recommendations?			
2	Can I name a successor public charity to receive my account when I and My Designees are gone?			
3	If I and My Designees are no longer are involved, what will happen to my account?			
	Assets to Donate; Charitable deduction			
4	Does the Fund accept publicly-traded stock?			
5	Does the Fund accept assets other than cash or publicly-traded stock?			
6	Will my donation to the Fund be deductible as a charitable contribution?			
	Dollar Minimums; Number of Grants			
7	What minimum donation must I make to the Fund?			
8	What is the minimum grant from the Fund to a charity?			
9	What is the minimum amount of grants I must make each year?			
10	What is the maximum yearly number of grants?			
	Costs			
11	What are the annual administrative charges for my size account?			
12	What are the Fund’s investment management charges?			
13	What other charges will apply?			
	Investments; Oversight; Returns			
14	What are the Fund’s investment options?			
15	Does one or more option match my own approach?			
16	Who oversees the investment of my account?			
17	Can my existing advisor manage my account?			
18	What rate of return would be reasonable to expect within my account?			

	Subject or Question	Fund A	Fund B	Fund C
	More About the Fund			
19	Is the Fund sponsored by a charitable organization, or is it part of an investment organization?			
20	What is my existing relationship with the Fund or its sponsor?			
21	What is the Fund's stated purpose?			
22	What are the existing relationship(s) between my advisor(s) and the Fund or its sponsor?			
23	How long has the Fund been operating?			
24	How large (in dollars) is the Fund?			
	Eligible Charities			
25	What are the basic requirements for being eligible to receive a grant from the Fund?			
26	Does the Fund make grants to non-U.S. charities?			
27	If yes, is there an added charge?			
28	Are there other geographic limits on grants?			
29	Are there mission-related limits grants?			
	Selecting Charities			
30	What advice and training will the Fund provide?			
31	Will the Fund help me (us) define my giving priorities?			
32	Will the Fund help find charities that meet my (our) giving priorities?			
33	Will the Fund check charities before grants are made?			
34	Will the Fund follow up with charities after grants are made?			
	Processing Grants to Charity; Reporting; Online Services			
35	What is the process for recommending grants?			
36	What is the process for the Fund processing my recommendations?			
37	How long does it take for the Fund to deliver a grant once my recommendation is made?			
38	What reports will the Fund provide to me, and how often?			
39	Can I make my giving recommendations online?			
40	Can I view the status of my account online?			
41	Can I review my past grants from my account online?			
	Privacy			
42	Will my identity and donation become public information through reports made by the Fund?			
43	Can grants be made anonymously?			