

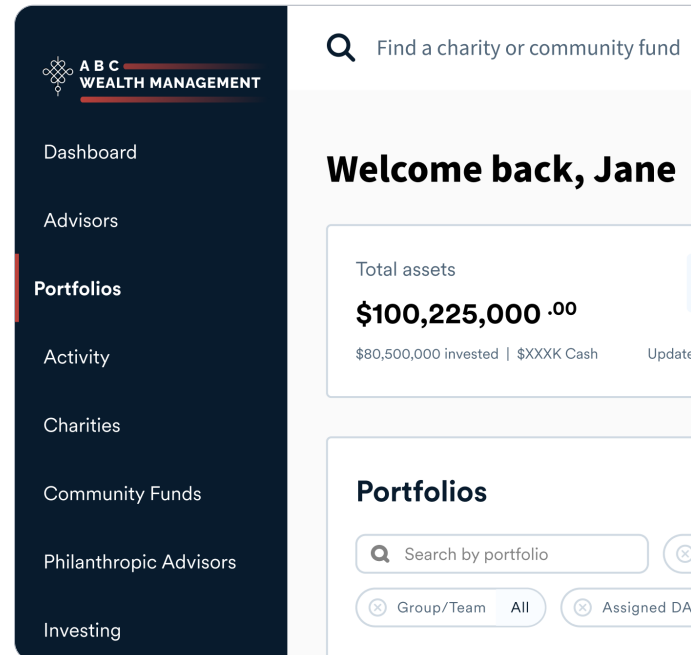
Turnkey Branded DAF Programs for Wealth Managers



Launch a powerful, white-labeled donor-advised fund (DAF) program¹ for your firm with custom investments, automated back office, and premier philanthropic services for even your most sophisticated clients.

Unlike existing DAF solutions, Foundation Source's donor experience is intuitive and modern, there are no complex back-office money movements, and there are no minimums for custom investments or charging your advisory fees.

The program is lightweight and can launch in a few business days. Unlock deeper conversations with clients, more assets per client, and stronger stories to attract prospects.



Powered by FOUNDATIONSOURCE

Foundation Source has partnered with Charityvest to offer a modern, tech-forward giving experience.

Charityvest is a leading DAF sponsor, serving individual donors, wealth advisors, and workplaces. In 2024, Foundation Source acquired Vennfi, the technology company powering Charityvest, to partner closely in the delivery of a DAF solution for our clients.

Engage Clients with a Fully Custom Giving Program

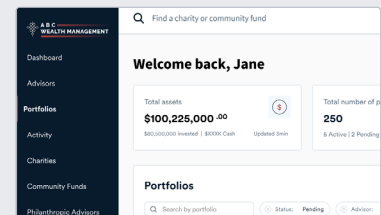
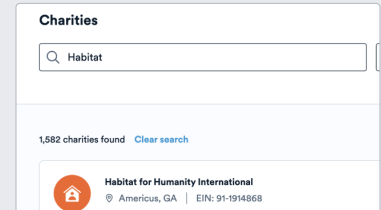
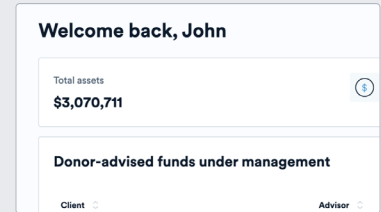
- Offer clients a modern DAF platform under your brand²
- Build and manage investment portfolios down to \$0 AUM
- Add giving metrics to your marketing, with real-time reporting

Differentiate with Superior Giving Experiences

- Give clients one dashboard and tax receipt for their giving³
- Offer curated collaborative giving and impact investing options
- Support any charity globally

Automate Your Donor-Advised Fund Administration

- Enjoy comprehensive management and reporting on client DAFs
- Set up automated trading and rebalancing operations
- Manage large balances at your desired custodian



Why Work with Foundation Source?

We are the only provider to have intentionally built our turnkey branded DAF solution for wealth managers to serve their clients in giving. Our technology is purpose-built to address the capabilities, workflows and requirements of private foundation administration, donor-advised funds, and planned giving programs.

1. A donor-advised fund is a separately identified account that is maintained and operated by a section 501(c)(3) organization, and is not a registered investment company.
2. Contributions to The Foundation Source DAF Program are irrevocable contributions made to Charityvest, Inc., a 501(c)(3) public charity.
3. Turnkey DAF programs are sponsored and administered by Charityvest, Inc. and contributions within are irrevocable contributions to Charityvest, Inc. a 501(c)(3) public charity.³

READY TO DIFFERENTIATE YOUR FIRM WITH PHILANTHROPY?

Contact us today at philtech@foundationsource.com.

www.foundationsource.com

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Charityvest, Inc. is a charitable organization described in Section 501(c)(3) of the Internal Revenue Code of 1986 (the "Code") and further qualifies as a public charity under Section 509(a)(1), 170(b)(1)(A), and 4966(d)(1) of the Code.

The information provided in this document is for general information purposes only, and does not constitute legal, tax or investment advice.

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