

Turnkey Branded DAF Programs For Nonprofits



Activate your major donors to support your mission more powerfully with a white-labeled donor-advised fund (DAF) program¹ that makes giving modern and seamless while keeping donors engaged with your organization—not a third-party platform.

The Turnkey DAF Program for Nonprofits offered by Foundation Source helps gift officers cultivate deeper donor relationships and maximize giving opportunities through premier philanthropic services designed for sophisticated donors.

Unlike traditional DAF providers that pull donors away from your organization, this solution strengthens your relationship by positioning your nonprofit as the advanced philanthropy partner your major donors expect. You'll provide world-class giving tools while maintaining control of the donor experience and deepening their connection to your cause.

The screenshot shows a user interface for Haverton University's DAF program. On the left is a dark red sidebar with the university's logo and a list of navigation options: Dashboard, Activity, Charities, Community Funds, Investing, and Philanthropic services. The main content area has a white background. At the top right is a search bar with a magnifying glass icon and the text 'Find a charity or community'. Below this is a 'Welcome back,' message. A card displays 'Olive's Charity Fund' with a balance of '\$100,000.00' and the label 'Account balance'. At the bottom, there is a section for 'Recent activity'.

**CHARITYVEST**

Powered by FOUNDATIONSOURCE

Foundation Source has Partnered with Charityvest to Offer a Modern, Tech-Forward Giving Experience.

Charityvest is a leading DAF sponsor², serving individual donors, wealth advisors, nonprofits, 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.

Fully Branded DAF Platform

KEEP DONORS CONNECTED TO YOUR MISSION:

- Custom-branded DAF platform and communications under your organization's identity³
- Simplified paperless account opening with no donor-facing paperwork required
- Launch in a few business days with minimal staff time—no lengthy implementation required

Delightful Donor Experience

REMOVE BARRIERS TO GIVING:

- Intuitive interface with automated transactions and next-day electronic grant delivery⁴
- No account minimums for DAF balances or investments
- Collaborative giving tools for creative donor engagement and family philanthropy

Complete DAF Administration

FOCUS ON RELATIONSHIPS, NOT PAPERWORK:

- One login to manage all DAFs with real-time views of giving activity and assets under management
- Tax-free growth on DAF assets through Charityvest investment portfolios
- Automated contribution and grant processing eliminates added administrative burden

Welcome back, Erica Smith

Total assets
\$103,000,900

Total DAFs
150

Donor-advised funds

Search by client or advisor

Client	Advisor	Portfolio	Balance
Erin Lowe elliott@onescent.com	Erica Smith	Conservative	\$20,000
Ronald Harvey elliott@onescent.com	Erica Smith	Conservative	\$10,000

Add client Export

Charities

Search Habitat Select state

1,582 charities found Clear search

Habitat for Humanity International

Americus, GA | EIN: 91-1914868

Habitat for Humanity of the Charlotte Region

Charlotte, NC | EIN: 56-1366233

Why Work with Foundation Source?

We are the only provider to have intentionally built our turnkey branded DAF solution for nonprofits to serve their donors in giving. Our deep domain and regulatory expertise in the philanthropic space complements and expands your philanthropic goals, while our technology is purpose-built to address the capabilities, workflows and requirements of 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. 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.
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.
4. Contributions to The Foundation Source DAF Program are irrevocable contributions made to Charityvest, Inc., a 501(c)(3) public charity.

READY TO ACTIVATE YOUR DONORS' FULL GIVING POTENTIAL?

Call 800.839.0054 or send us an email at info@foundationsource.com.

www.foundationsource.com