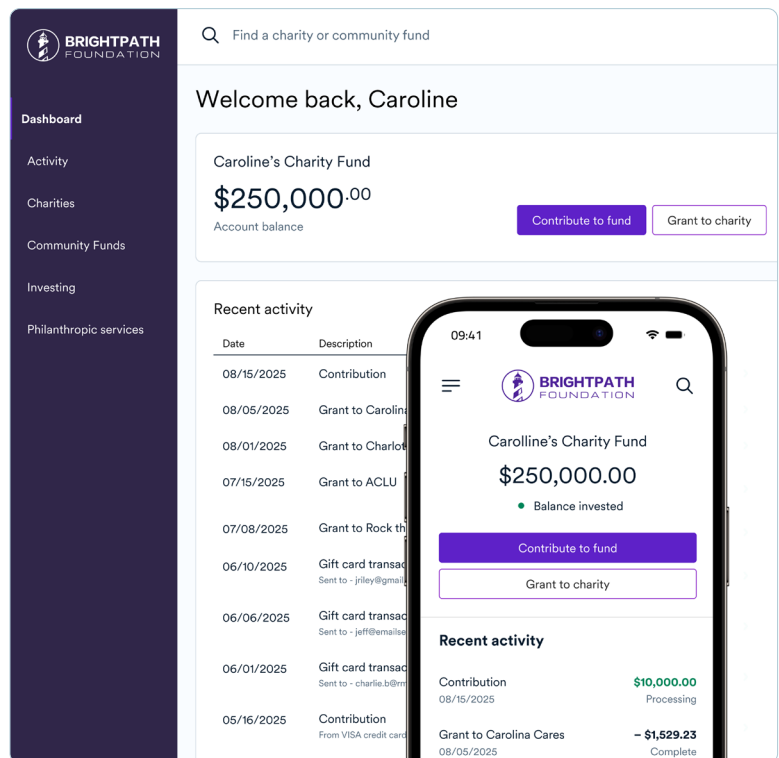# The Modern Operating System for Donor-Advised Funds

Leverage world-class technology and industry-leading infrastructure to modernize your donor-advised fund (DAF) program with DAF OS—a complete, programmable administration platform for DAF-sponsoring public charities. This powerful operating system combines modern DAF technology, automation, and seamless integration with hands-on support for administrators, including onboarding and technical assistance.

DAF OS empowers your organization to:

- Scale donor engagement

- Simplify compliance

- Automate back-office operations while enabling custom investments and flexible governance

- Access robust accounting systems with integrated support for separately managed accounts

Offer your donors a delightful giving experience with easy-to-use technology, broad investment configurations, and options for integrated marketing and support tools. Money movements feel fast, and your organization builds trust. As the most modern and compliance-oriented DAF software, DAF OS offers a faster, scalable, and customizable platform on which to grow your DAF program.
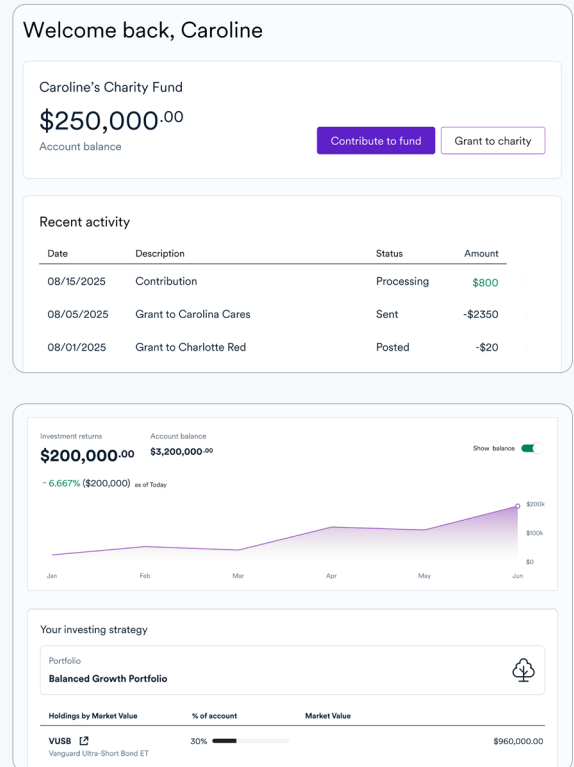

A FULLY MODERN USER INTERFACE AND DONOR EXPERIENCE

DAF OS: Modern Infrastructure For Modern Philanthropy

What makes DAF OS different:

- **More Than a System of Record**: DAF OS is not just an accounting ledger—it's a modern, fintech-grade platform with automated money movement, programmatic grantmaking, and real-time fund visibility.

- **Tailored Investment & Governance Programs**: Run any investment lineup: custom SMAs, ETFs, alternatives, or pooled funds. Build workflows that reflect your policies and grantmaking rules.

- **Embedded Modern Donor Experiences:** Out-of-the-box, mobile-first donor portal. Paperless onboarding. Role-based access and tools for your team.

- **Fully Automated Compliance & Operations:** No more spreadsheets. DAF OS automates restricted asset tracking, donor communications, grant letters, and audit-ready reporting.

Why Work with Foundation Source?

We are the only provider to offer a complete, programmable administration platform designed specifically for DAF-sponsoring public charities. Built to manage the full complexity of enterprise-grade philanthropy with the efficiency of modern financial technology, our platform combines comprehensive capabilities with proven expertise. Strengthened by deep relationships across donors, advisors, and nonprofits, we are uniquely equipped to help sponsoring organizations drive engagement, expand partnerships, and maximize the impact of your DAF.

READY TO TRANSFORM YOUR DONOR-ADVISED FUND OFFERING?

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

www.foundationsource.com

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