



Helpful Donor-Advised Fund Resources:

## What is a donor-advised fund (DAF)?

A DAF is a flexible charitable giving account that can help make your giving more strategic and intentional. Once you contribute assets to your DAF account, you can recommend how those assets are invested for potential tax-free growth, as well as when and where grants are made to qualified U.S. public charities.

DAFs are often used as part of a broader approach to charitable and financial planning, helping donors align their giving with their goals over time. Contributions may also be eligible for a current-year tax deduction, if you itemize when filing taxes.

## 2026 year-end giving guidelines

Plan your 2026 year-end giving with a donor-advised fund (DAF) to support the charities and causes you care about while potentially qualifying for a charitable tax deduction.

Review the key guidelines below:

- Your DAF account with DAFgiving360® must be open before you can contribute assets or recommend a grant
- Contribution processing times vary by asset type and begin November 6, 2026
- Recommend grants to charities by December 1, 2026

## Contribution guidelines

Some contributions must be initiated as early as November 6. DAFgiving360 accepts a wide range of assets, including cash, publicly traded securities, and more.

After your charitable donation is received and processed, you'll get a tax receipt and may qualify for a 2026 tax deduction.