



How to Transfer your Existing Donor Advised Fund to an American Endowment Foundation (AEF) Donor Advised Fund

Transferring your current donor advised fund (DAF) from your existing administrator to American Endowment Foundation (AEF) is a simple and easy process to implement.

After you have completed the [steps for opening a new DAF at AEF](#) , you will then complete the following:

- 1) Complete a grant request form from your existing DAF, no differently than when you make grants to the charitable causes that you support.
- 2) On the grant request form, the grantee will be American Endowment Foundation FBO the Donor Advised Fund's name.
- 3) To transfer the entire DAF amount, specify the grant amount to be "Fund Balance". This will ensure that the entire and current amount of your fund value at the time of the grant request will be transferred into your new DAF at American Endowment Foundation.

For many other DAF administrators, AEF already has pre-filled grant forms that you can use to complete this process easily. Call our Gifting Department at (888) 440-4233 to see if we have a pre-filled grant request form for your current donor advised fund administrator.

Feel free to contact us with any other questions that you may have and our staff will help make this process as simple and easy as possible.

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