

# Introduction

## What's a Donor Advised Fund (DAF)?

Think of a DAF as a charitable bank account. It's a **flexible, efficient** and **secure** vehicle for you to support the nonprofits of your choice on the **timeline that's best for you**. DAFs can help **maximize how much you have to give** by accepting a wide variety of **tax-advantaged assets**.

You can both **contribute** to a DAF as much and as often as you like, including transfers from existing DAFs, and **make grants** from your DAF to great charities as much and as often as you like. DAF contributions are irrevocable and treated in the same way as donations to any public charity.

We currently have DAFs in the **US, UK** and **Germany** and work with partner organizations to facilitate tax-efficient granting from other countries. Please speak to our team to find out more.

## How does it work?

1

### Donate diverse assets

(e.g. public or private shares, cash, crypto) and receive any available tax benefits

2

### Manage your giving via our member app

Make contributions in and grant out

3

### Get 1:1 guidance to give more effectively

4

### Securely grant around the world

#### ! Problem

Giving can come with a lot of admin, whether that's figuring out how to donate tax-optimized assets, keeping track of your donations, vetting organizations, or navigating global regulations.

#### 🔑 Solution

A tax-efficient giving account that makes it seamless to give anywhere in the world, no matter how big or small the donation. We handle all the logistics and due diligence, and provide guidance on how to give most impactfully.



# Your Donor Advised Fund (DAF) Explained

## More to give



### Tax-efficient giving

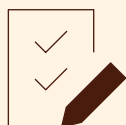
Fund your charitable goals with diverse assets (including public and private securities, crypto, and more) and receive any available tax relief when you contribute to your DAF.

## Zero admin



### Simplified logistics

Let us streamline your giving by handling all the logistics. You can manage all your contributions and grants in one place with our member app, and give access to important partners, including family and external advisors.



### Unparalleled due diligence

With our [rigorous due diligence](#)<sup>↗</sup>, every grant you make is secure.

## Unique expertise



### Global and complex grants

Our team are leaders in facilitating global and complex grants, so you can give to innovative projects in 40+ countries with confidence.



### Comprehensive support

Make the most of your DAF with high-impact funding recommendations vetted by our Research team; 1:1 philanthropic advising tailored to your goals; and unique events with fellow entrepreneurs around the world.

## Want to discuss what's right for you?



We meet our members where they are on their personal giving journeys, and tailor our services to your needs.

Find out more about our global giving infrastructure on our [website](#)<sup>↗</sup> or [get in touch](#)<sup>↗</sup> to speak with a member of the team.





# UK and German Donor Advised Funds (DAF) Details



## Account Basics and Management

Charity Registration	 Founders Pledge Ltd (FP Ltd), No. 1162201  Founders Pledge gGmbH (FP DE)
Administered by	Founders Pledge
Legacy Planning	Yes, you can set up a succession plan for your DAF
Third-Party Account Access	Yes, you can give others (advisors, family, partners) access to your DAF
Minimum Amount to Open Account	\$10,000 <sup>1</sup>
Minimum Account Balance	No
Admin Fees	No
Investment Options	No

## Contributions

Assets Accepted	Cash, Public Securities <sup>2</sup> , Private Securities <sup>3</sup>
Currency Accepted	 GBP, Euro, USD  Euro

## Grants

Minimum Domestic Grant Amount <sup>4</sup>	\$1,000 minimum within and between Founders Pledge jurisdictions (US, UK, Germany)
Minimum International and Complex Grant Amount <sup>4</sup>	\$10,000
Minimum Recommended Funding Opp Grant Amount	\$1,000 minimum to a Founders Pledge recommended funding opportunity, regardless of jurisdiction
Processing Fees	No
Spend Down Policy	 No  Contributions to be granted out according to German government 'two year rule'

1. The dollar sign is used here for simplicity; currency will vary by jurisdiction and is fixed for Germany (Euros).
2. All marketable securities shall be sold upon receipt unless otherwise directed by Founders Pledge's CEO, COO or staff in consultation with the audit and risk committee. We will determine the disposition of securities and will make all decisions regarding the sale or retention of securities. Upon request, we may consider short term sales plans at the time of receipt, with trustee approval.
3. Our UK DAF does not typically accept private securities, but exceptions are possible after we evaluate the opportunity.
4. Grants are domestic if made within and between Founders Pledge jurisdictions (US, UK, Germany) and international if made outside.

