



Donor-Advised Fund Checklist for Advisors

We understand that charitable giving is an important part of a donor's overall financial plan. That's why we have created this checklist for advisors who want to help their clients give from a donor-advised fund (DAF) to the Human Rights Campaign Foundation.

- Speak with your client about how they might like to designate their gift according to what they are passionate about. Our team can provide a list of initiatives and impact areas that match your client's interests.
- Determine the best way for your client to structure a gift from their DAF.
- Ask your client if they would like to make the HRC Foundation an ultimate beneficiary of their DAF. Doing so will allow them to create their legacy of equality and inclusion for the LGBTQ+ community.
- When coordinating a grant to the HRC Foundation with your client's DAF custodian, please reference the following information:

The Human Rights Campaign Foundation
Sylvester Owens, Director of Estate Planning
1640 Rhode Island Ave. N.W. Washington, D.C. 20036-3278
Phone: 202-572-8918
Email: sylvester.owens@hrc.org
EIN: 52-1481896

We are here to help you and your clients to give with confidence. If you have any questions or need assistance, please do not hesitate to contact us. We look forward to working with you.