

Your Donor-Advised Fund Roadmap for Giving Season



A clear path for advisors to guide clients, especially those without a DAF, through year-end giving



Key Milestones

Sept/Oct is the best window to open new DAFs

Dec 19 – Deadline to guarantee opening a new DAF this year.

Dec 31 – Final day to contribute for 2025 tax benefits ¹



ProTip!

Open the account now, even if your client hasn't decided on an amount. It gives clients flexibility and ensures everything is ready for year-end.

Step 1: Take Inventory

Pinpoint clients who:

- Have taxable events, rebalancing needs, or wealth transfers
- Would benefit by reducing taxable income this year
- Are already giving charitably and could use a more strategic tool
- Want to plan ahead of the OBBBA deduction changes in 2026

OCT 9

DAF Day

Step 3: Create the Account for New DAF Clients

- Encourage clients without a DAF to open in **Sept/Oct** for a seamless year-end
- **Dec 19** is the last guaranteed date for new DAFs (earlier is better)

Step 4: Contribute

- Reinforce **Dec 31** as the contribution deadline
- Contributions can include cash, appreciated stock, or other assets
- Encourage early transfers to keep the process smooth and stress-free

Step 2: Engage Existing DAF Clients

- Confirm they've contributed this year if that was a part of their plan
- Partner with them on contributions and granting strategies and maximize their tax benefits before **Dec 31**

SEP 1

Giving Season begins

NOV 27

Thanksgiving

DEC 2

Giving Tuesday

DEC 19

New DAF deadline

The Bottom Line

Advisors that follow this roadmap help clients capture the full value of a DAF and end the year smoothly.

Ren powers the DAF platform behind your firm—seamless, secure, and designed for sophisticated giving.

¹ Stock and other appreciated assets must be received by Dec 31. Plan ahead as stock transfer times can vary. Checks must be postmarked by Dec 31.