

How to Open a Renaissance Charitable Donor-Advised Fund

For Ameriprise Advisors

1. Open Investment Account
2. Submit the Online DAF Application
3. Docusign the DAF Application
4. Login and Create Your Password
5. Send Proof of Funding
6. Account Ready for Granting



Before you begin:

- Review and provide **RCF DAF Program Circular** to your client.
- For all investment account documentation, Renaissance Charitable Foundation (RCF), not the donor, must be listed as the account owner.
- Ameriprise advisors need to be licensed in the state of Indiana to open a new RCF account at Ameriprise.

1. Open the Investment Account

Open AdvisorCompass and locate the DAF Reference, aka ASK 1982, by typing the following: **“Donor Advised Funds”** or **“1982”** into the Search Bar.

Links are also found on the Mutual Funds Overview Product Page.

Please also feel free to contact the Ameriprise Service & Operations New Business Team at **(800) 297-6663** and say **“New Business.”**

Contact number listed for text confirmation of e-signature requests ONLY.

Do NOT move forward to step 2 until the investment account is fully open with the account number.

2. Submit the Online DAF Application

You'll need the primary financial advisor's CRD number and the investment account number to complete this step.

New Advisor

Start the [application here](#) →

Existing Advisor

Please [log-in to your account](#) and select 'Add an Account'

3. Docusign the DAF Application

Check your inbox for a DocuSign requests from DAFappSupport@reninc.com with the **Subject Line: Sign Your DAF Application**. The email goes to the primary advisor and donor(s) listed on the application only.

4. Login and Create Your Password

New Advisors and Your Client

You and your client will receive a welcome email from do_not_reply@reninc.com containing a link to complete your credentials. Use it to log in and set your permanent credentials. If you or your client missed the window to set-up, go to ampf.donorfirstx.com, select **Log In** and then click **Create or Reset Password**.

Existing Advisor

You will find the new account under Account Listing in the Donor Portal.

Note: The account will have \$0 balance until the next step is complete, please wait to recommend a grant until the balance appears.

5. Send Proof of Funding

Once the investment account is funded, please send the below information to ampf@reninc.com with **Subject Line: Proof of Funding [Account Name]**.

Body of the Email

Donor Name

DAF Account Code (as detailed in your credential email)

Screenshot of the investment account or statement that includes:

Investment Account number

Asset Type

Number of shares / cash amount

Asset Name

Date of initial funding

Ren will review and post the contribution to the account.

6. Account Ready for Granting

Once Ren does a final review the account will be placed in grant ready status.

Please Note: Once your grant has been submitted and passed vetting, an invoice will be available on your Donor Portal in the Engagement Hub. There, you'll find instructions on how to fund your grant.