Ren

Year-End Client Checklist

Donor-advised funds have become the fastest-growing charitable vehicle in the U.S. If you're not proactively discussing giving with clients, someone else likely is.

2026 Key Deadlines

Review your book of business and prioritize these client conversations before year-end deadlines.

Complex assets should be initiated as early as possible.

For granting by year-end

New Account Paperwork

Dec. 1st

2026 TAXES

Contributions

Dec. 31, 11:59 p.m.

Important!
The contribution to the DAF, not the grant to the charity, is what may qualify for a tax deduction.

Business Owners & Complex Assets

Trigger: *A client is preparing for a sale or owns hard-to-donate assets.*

- Private business interests
- Pre-IPO shares
- Real estate
- Other complex assets

Existing DAF Holders

Trigger: *A client already has a DAF but hasn't contributed in 2026.*

- What's their contribution plan?
- Get grants in ASAP to avoid year-end chaos
- Updated giving goals?
- Family involvement?

Liquidity Events & High-Income Years

Trigger: *A client had an extremely lucrative year.*

- IPO
- Large bonus
- Stock options
- Capital gains
- Inheritance

Estate & Legacy Planning

Trigger: *A client is discussing the future.*

- Estate updates
- Engaging the next generation
- Legacy planning
- Unwinding a Private Foundation for greater focus on giving

Appreciated & Concentrated Positions

Trigger: *A client is considering selling appreciated investments.*

- Concentrated stock
- Long-held securities
- Diversification needs

Annual Donors

Trigger: *A client is missing tax savings from giving without a plan.*

- Supports multiple charities
- Writes checks and wants simpler recordkeeping