How to: Transfer an Existing Donor-Advised Fund

You can transfer accounts from the RCF Direct or American Endowment Foundation Programs to the Renaissance Charitable Foundation for CapitalGroup Private Client Services Program. The steps below should be followed:

Step 1: Establish the Receiving DAF

Open a new Pershing investment account that will be associated with the new DAF.

Login to the new RCF for Capital Group Private Client Services online portal to complete the new DAF application. This is the only document (application) that the client/donor will need to sign via DocuSign.

Step 2: Request an Account Closing

- If the DAF is currently held at the RCF Direct program, enter an Account Closing Grant request from the RCF Direct website (rcf.donorfirstx.com) for the existing RCF Direct DAF.
- If the DAF is currently held at the American Endowment Foundation program, enter an Account Closing Grant request from the AEF website (portal.aefonline.org) for the existing AEF DAF.
  - Please enter the Account Closing Grant with the following details:
    - Nonprofit Name: Renaissance Charitable Foundation Inc.
    - EIN/Tax ID: 35-2129262
    - Address: 8888 Keystone Crossing, Suite 1222, Indianapolis, IN 46240
    - Purpose/Designation: **Name of new DAF created in CapitalGroup Program and new investment account # opened**

Step 3: Complete the Transfer

RCF will confirm receipt of funds and complete the account setup on the new CapGroup platform.

*Note: This will be considered a DAF to DAF transfer because the program will be changing. Historical data will remain in each respective program.

Need Assistance?

If you have questions about transferring an existing donor-advised fund or need assistance completing the process, contact Ren's Charitable Team for guidance.

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