Ren

How to: Transfer an Existing Donor-Advised Fund

Help clients move an existing donor-advised fund from another provider to a Ren-powered sponsoring charity with a simple transfer process. It only takes three steps:

Step 1: Establish the Receiving DAF

Before initiating the transfer, the client must open a donor-advised fund with Renaissance Charitable Foundation. This account will receive the transferred assets.

Step 2: Request an Account Closing Grant

Submit an Account Closing Grant request with the client's current DAF provider. Include the client's new RCF DAF name and investment account number.

- Nonprofit Name: Renaissance Charitable Foundation Inc.
- EIN/Tax ID: 35-2129262
- Address: 8888 Keystone Crossing, Suite 1222, Indianapolis, IN 46240

Step 3: Complete the Transfer

Once the transfer is received, Ren confirms receipt of the funds and completes the account setup. The client can then begin recommending grants through their new RCF donor-advised fund.

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.

AskAnExpert@reninc.com