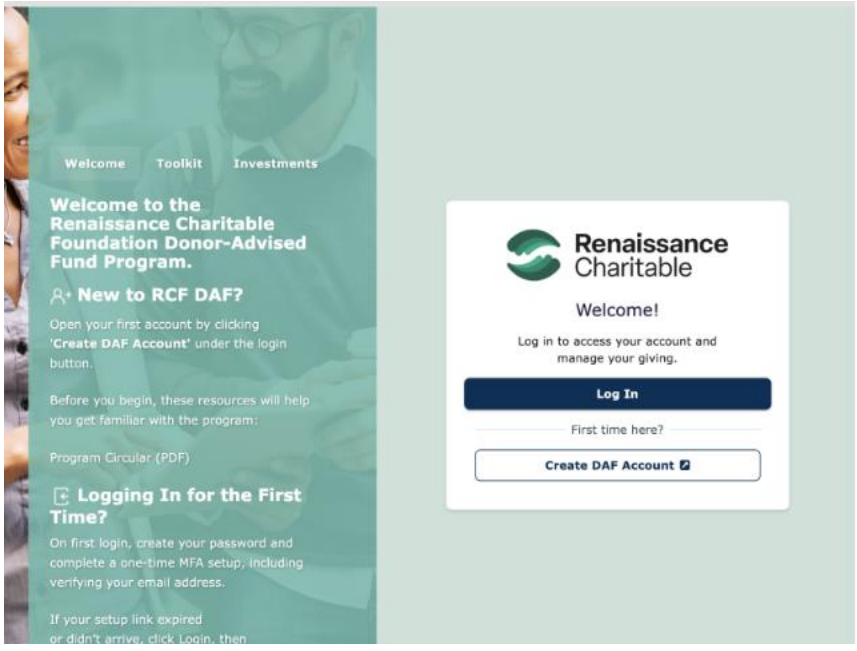
DAF Online Application Step by Step

The online application guides you through account opening quickly and efficiently. Complete your application in minutes, with automated workflows that generate signature-ready documents and keep everything moving forward. No manual handoffs, no back-and-forth delays. Self-service tools are built in so Financial Advisors can address questions on the spot, without waiting on support teams.

How to Access DAF Application

New: Go to the programs platform URL and Select Create DAF Account. You can find at https://www.reninc.com/find-your-daf/
Existing: Log in to your account and select “Add an Account” on the homepage.

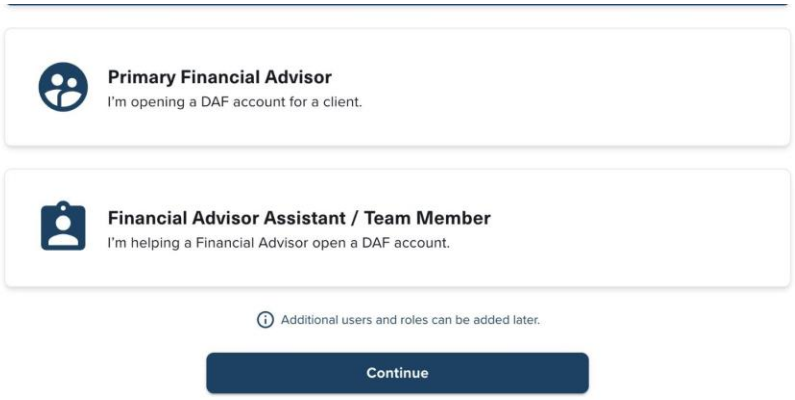


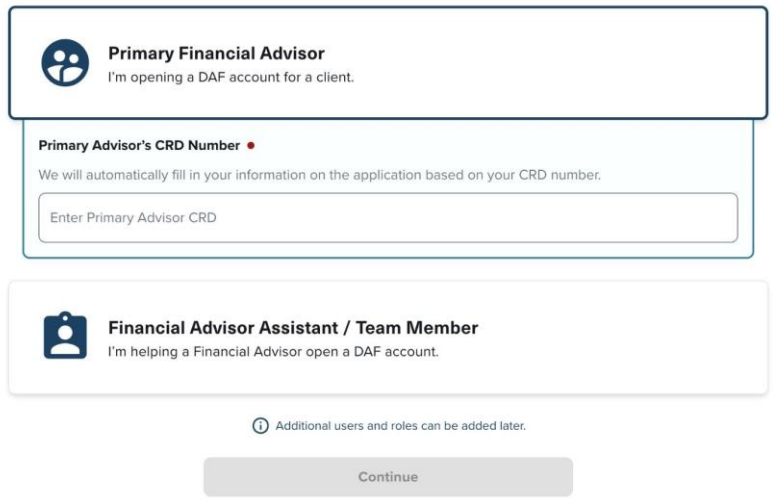
How To Fill Out the Application

The new application is designed to be quick and straightforward, with just two pages needed to collect the information required to open a DAF.

Step 1: Identify Your Role

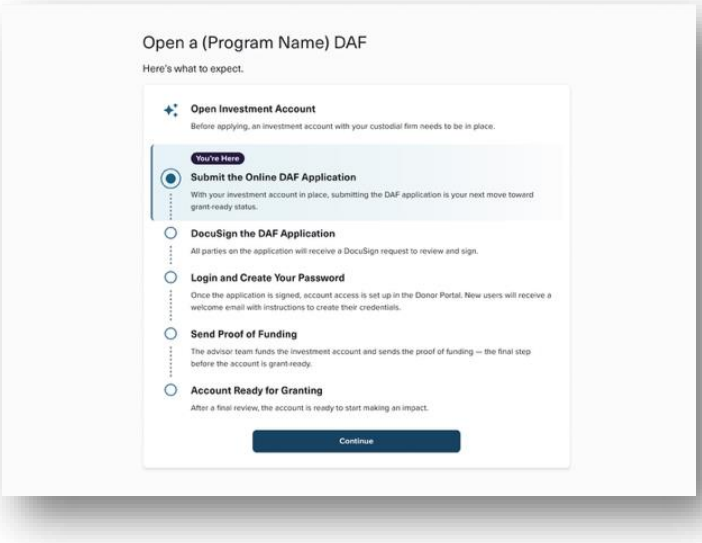
Begin by selecting the role on the account you are opening. You will be asked to enter the primary advisor CRD (Central Registration Depository) number so we can identify them and streamline the rest of the application. For future account opening, the CRD number will be prefilled if logged in.

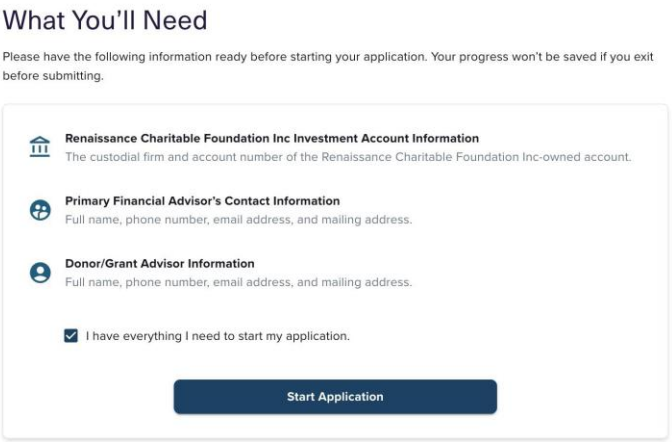




Step 2: Review Account Opening Steps and Information Needed for the Application

The first screens detail all the steps needed to get an account grant ready, as there are more steps after submitting the application. The second screen will detail the information required to complete your submission. The investment account MUST be opened prior to submitting the DAF application. To note: Sending Proof of Funding is not needed.

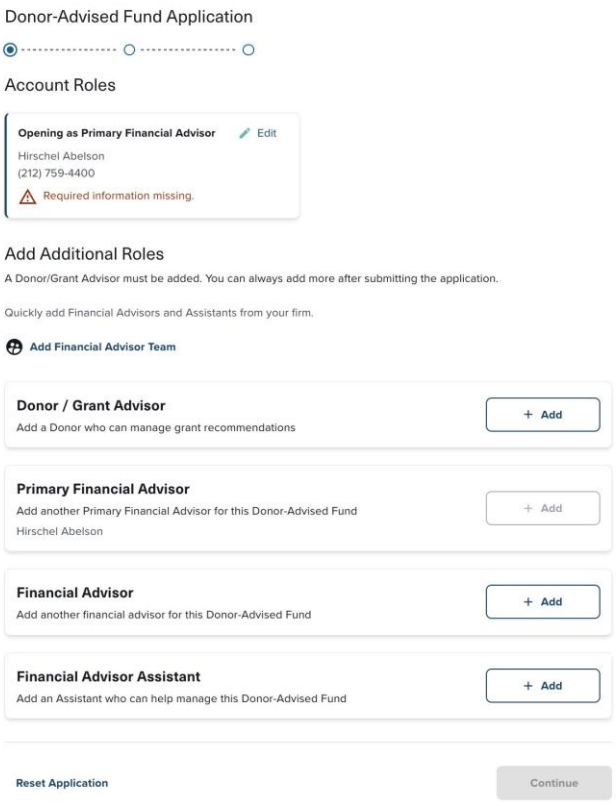


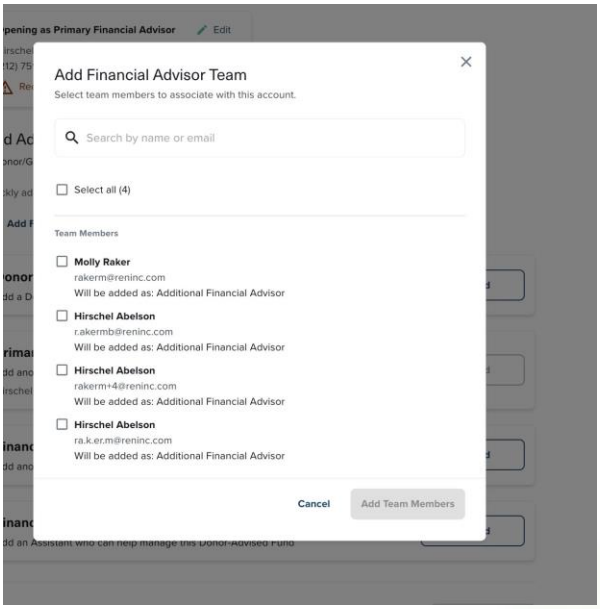


Step 3: Enter All Account Roles

Fill in the remaining required information on the primary advisor based on the CRD number, as well as add in the Donor(s) and the Advisor team's information.

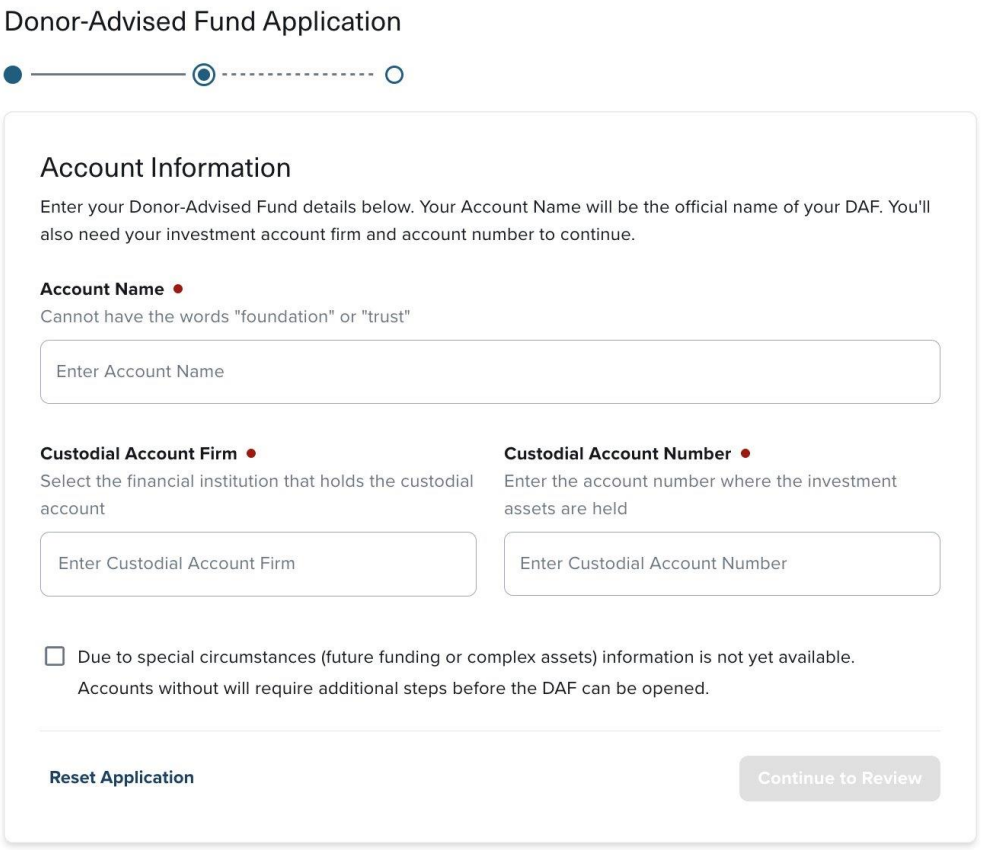
You can add other Advisors or assistants by choosing Add Financial Advisor Team, to select existing advisors from your other accounts. No need to enter all their details again.



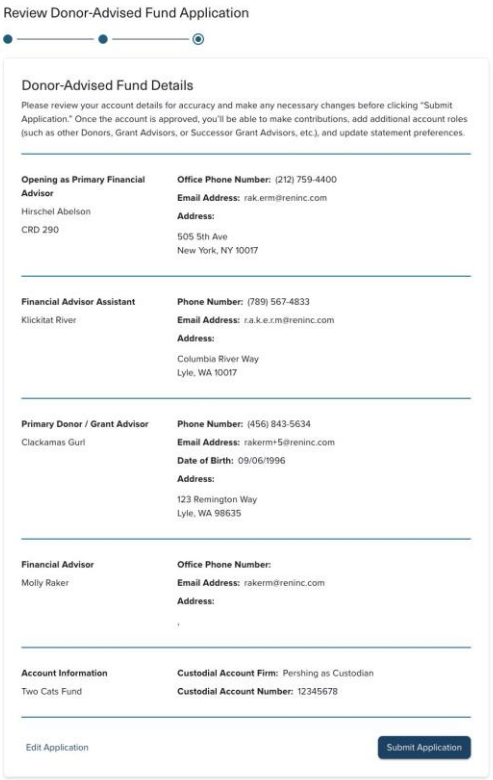


Step 4: Account Information

After adding the account roles, fill in the Account Name and the Investment Account details.

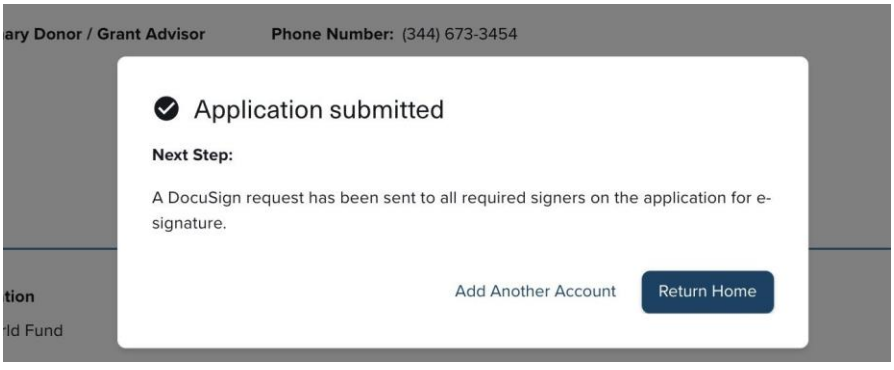


Step 5: Review Application Details and Submit



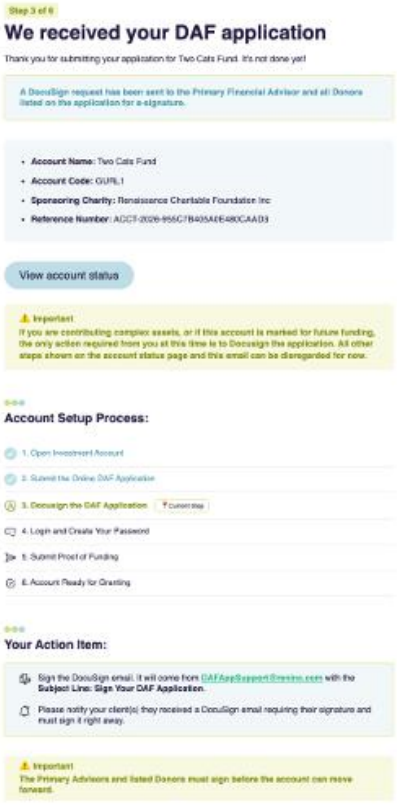
Step 6: Submit and Next Steps

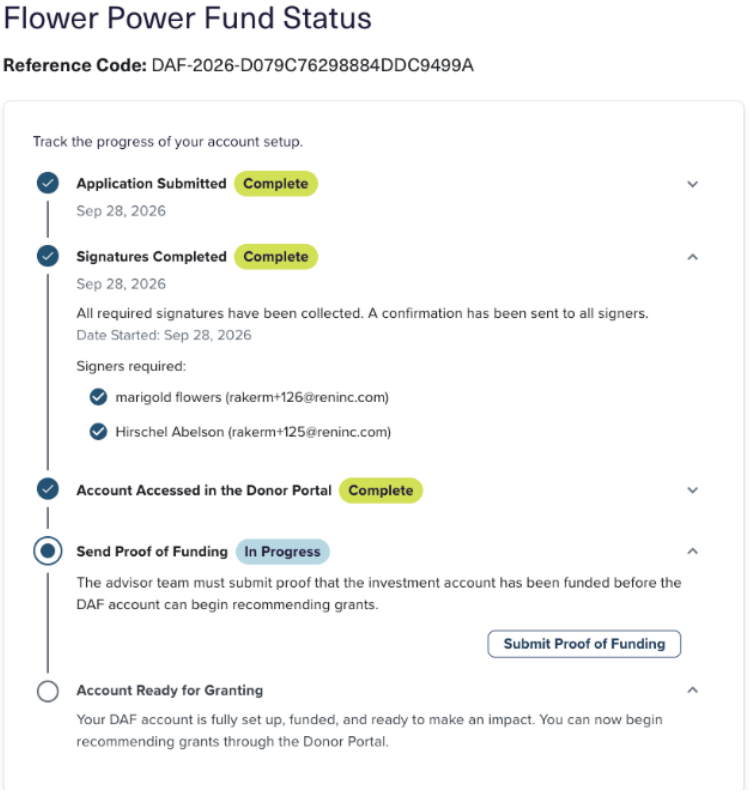
Once you submit the application, you'll see a confirmation message outlining what happens next and any additional actions that may be required.



Two emails will be sent:

1. Docusign Envelope for signature to the Primary Advisors and Donor(s)
2. Confirmation Email after submission from Ren with a link to track the status of the account and outlining additional steps to do before the account is grant-ready. Subject Line: {Account Name} DAF Application Received



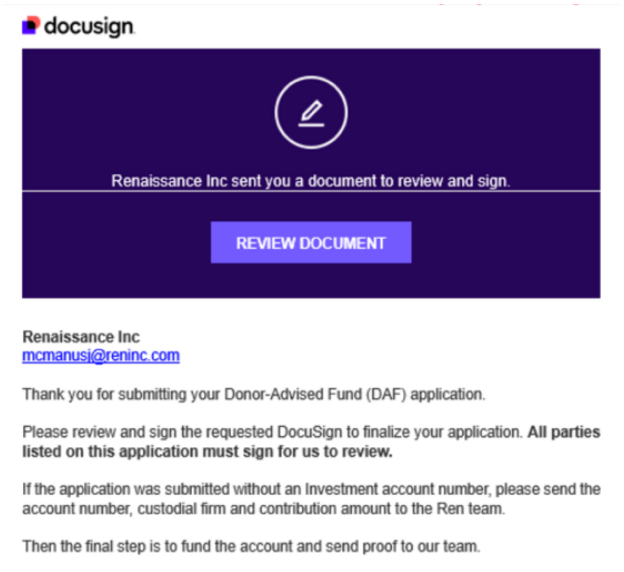


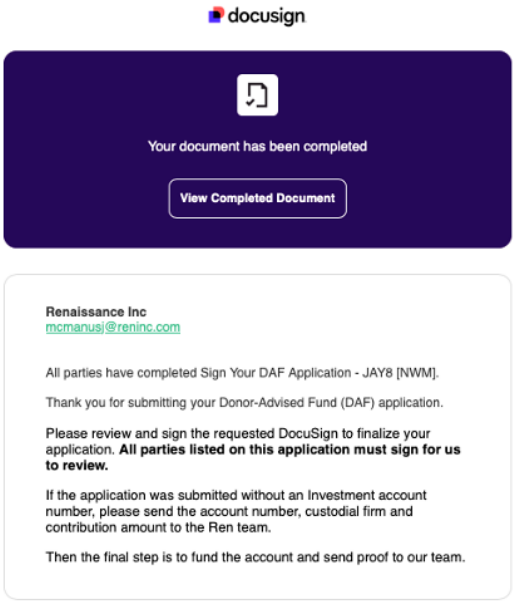
Signing the Application - DocuSign

You'll receive an email from Docusign with a link to electronically sign your DAF paperwork. The application will not move forward until all required parties listed in the application—including the Financial Advisor and any donor(s)—have completed their signatures.

From: **dse_NA3@docusign.net**

Subject Line: Sign Your DAF Application - [Account CODE] - [Program Code]





After the application is fully signed, ensure assets are moved to the Investment Account. The DAF account will go into an account review to pick up the contribution on the data feed connection. Until then, the balance shows $0. Nothing for you to do. We will notify you once the account is grant-ready.