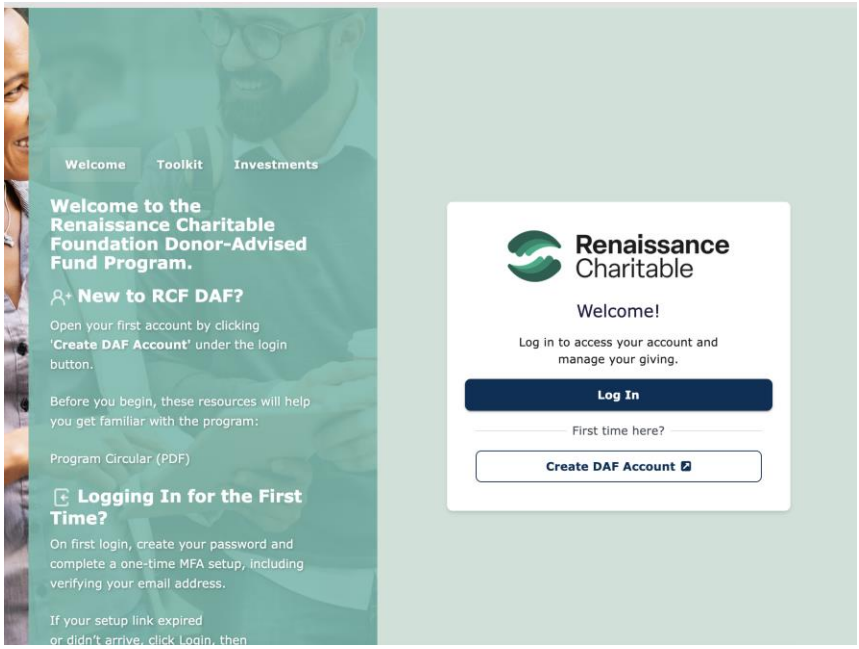
DAF Online Application Step by Step

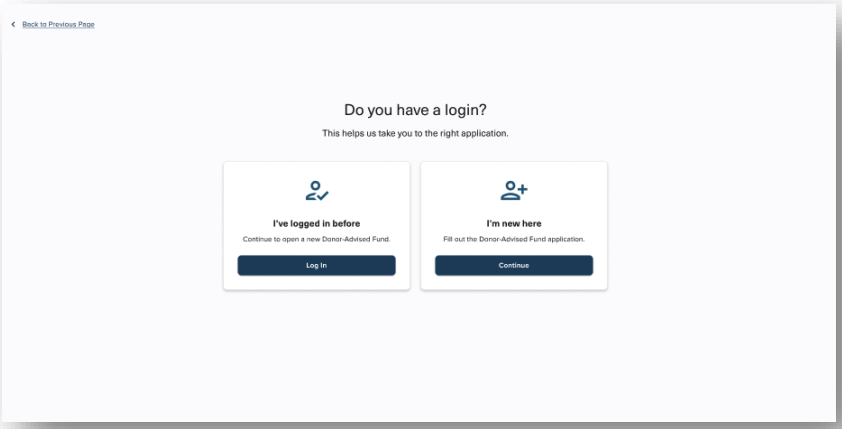
The online application guides you through account opening quickly and efficiently. Complete your application in minutes, with automated workflows that generate signature-ready documents and keep everything moving forward. No manual handoffs, no back-and-forth delays. Self-service tools are built in so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

How to Access DAF Application

NEW ADVISORS.

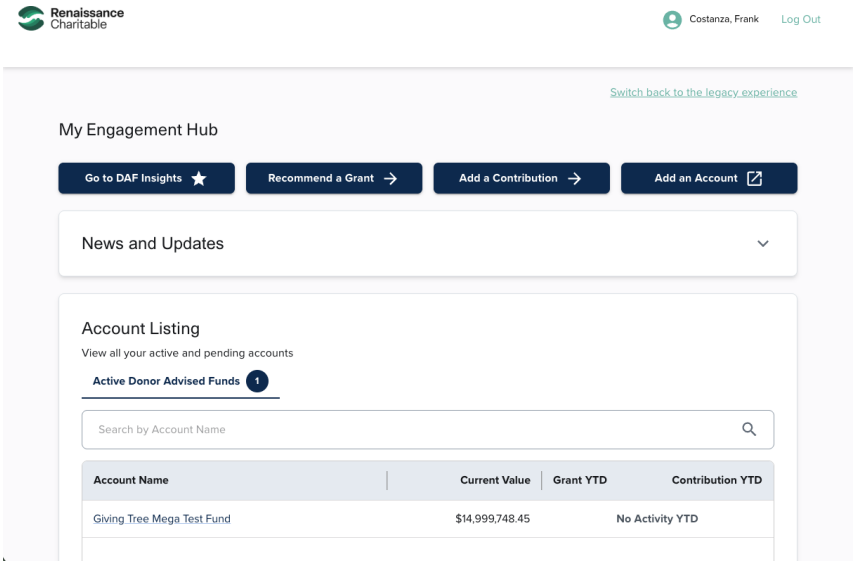
Start by navigating to the platform log in page, which you can find at https://www.reninc.com/find-your-daf/. From there, select **Create DAF Account.** You will be asked if you are new or if you've logged in before. Select 'I'm new here'.





EXISTING ADVISORS

Simply log in to your account and select Add an Account on the homepage (Engagement Hub); your information on file will be prefilled on the new application.

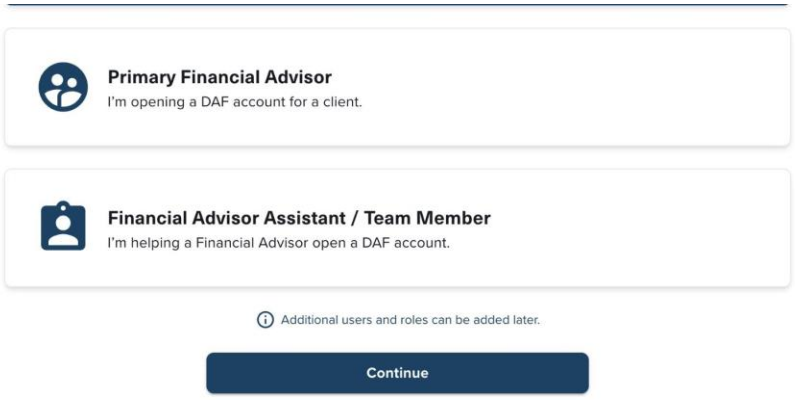


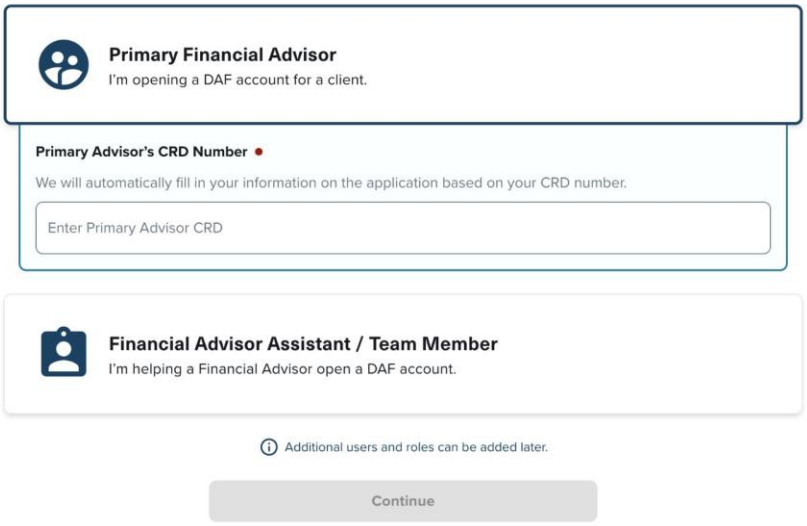
How To Fill Out the Application

The application collects only the essential information needed to open your DAF account. The investment account must be opened before submitting the DAF application. Additional information on beneficiaries and more are asked after the account is opened.

Step 1: Identify Your Role

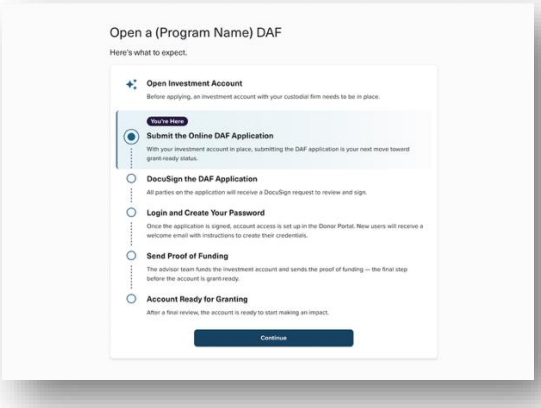
Begin by selecting the role on the account you are opening. You will be asked to enter the primary advisor CRD (Central Registration Depository) number so we can identify them and streamline the rest of the application. For future account opening, the CRD number will be prefilled if logged in.

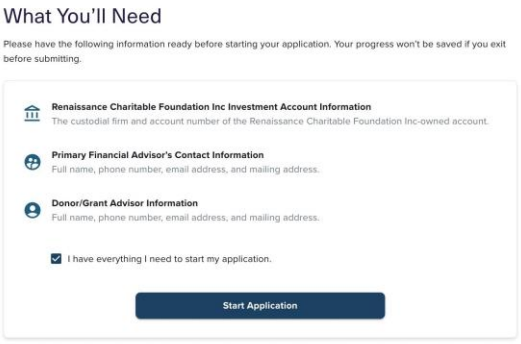




Step 2: Review Account Opening Steps and Information Needed for the Application

The first screen details 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.

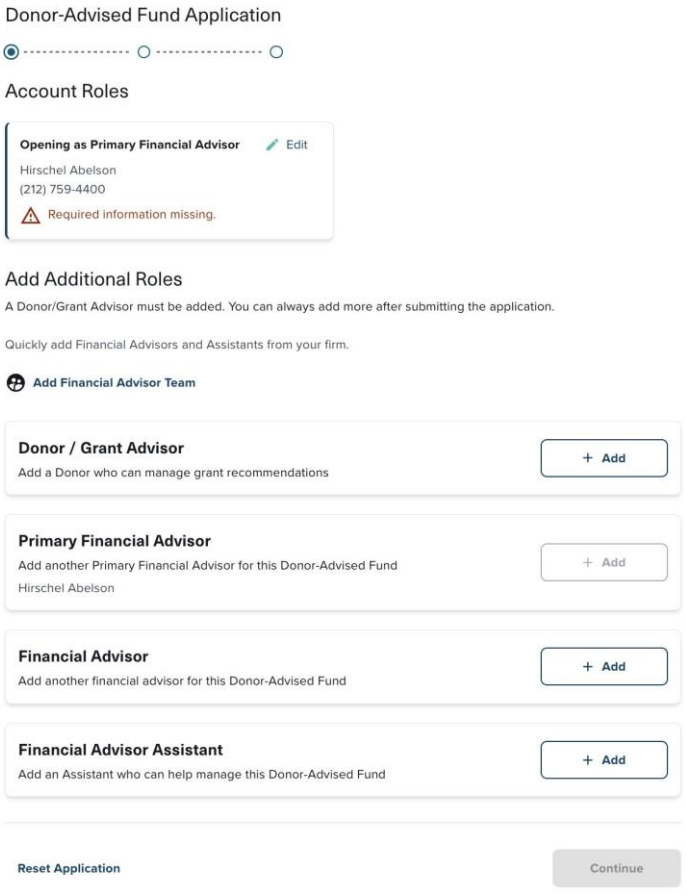


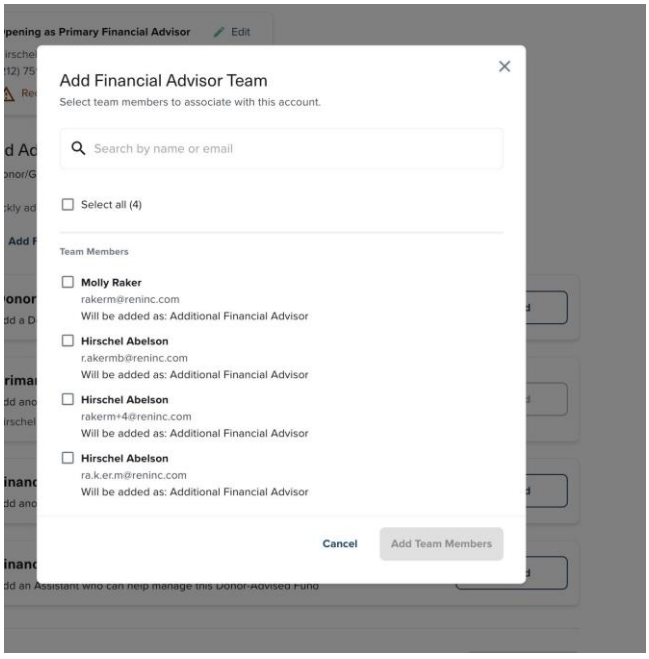


Step 3: Enter All Account Roles

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

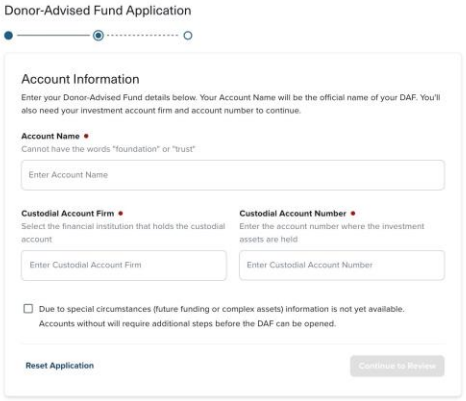
You can add other Advisors or assistants one by one, or if you have an account already, you can choose from your advisor team in bulk.



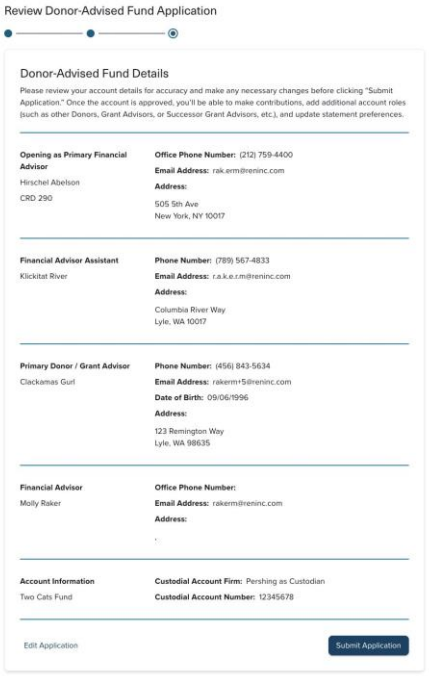


Step 4: Account Information

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

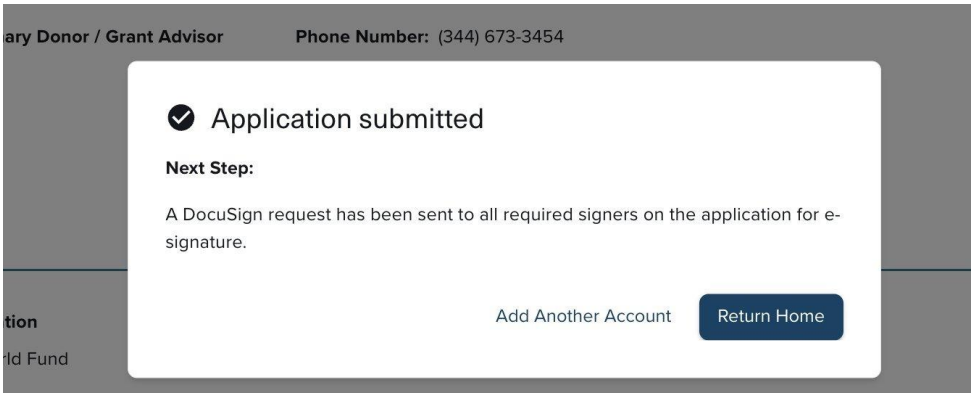


Step 5: Review Application Details



Step 6: Submit and Next Steps

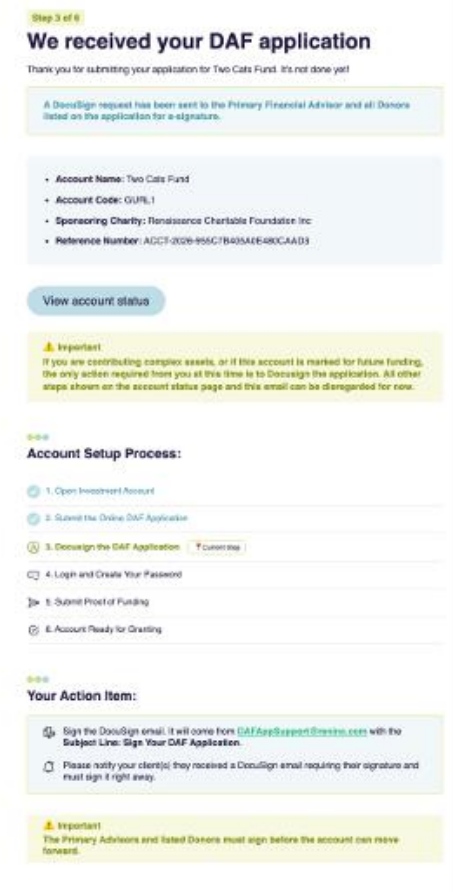
Once you submit the application, you'll see a confirmation message outlining what happens next and any additional actions that may be required.



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



We received your DAF application

Thank you for submitting your application for Two Cats Fund. It's not done yet!

A DocuSign request has been sent to the Primary Financial Advisor and all Donors listed on the application for e-signature.

- **Account Name:** Two Cats Fund
- **Account Code:** GUPL1
- **Sponsoring Charity:** Renaissance Charitable Foundation Inc
- **Reference Number:** ACCT-2026-955C7B405AE6480CAAD3

View account status

Important
If you are contributing complex assets, or if this account is marked for future funding, the only action required from you at this time is to DocuSign the application. All other steps shown on the account status page and this email can be disregarded for now.

Account Setup Process:

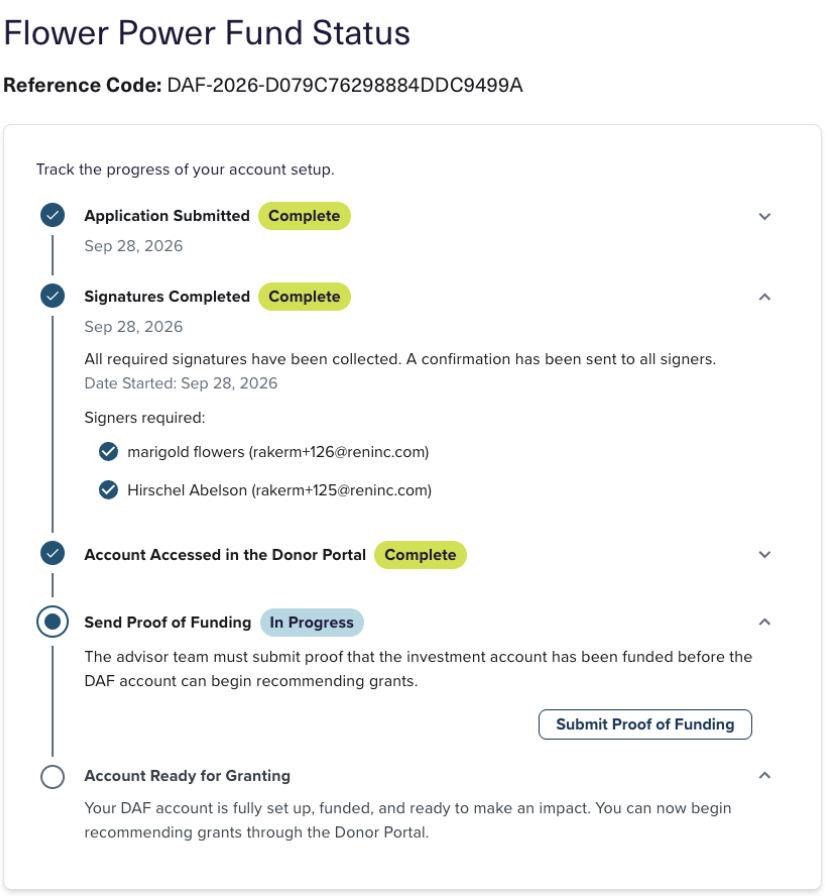
1. Open Investment Account
2. Submit the Online DAF Application
3. DocuSign the DAF Application — Current Step
4. Login and Create Your Password
5. Submit Proof of Funding
6. Account Ready for Granting

Your Action Item:

Sign the DocuSign email. It will come from DAFAppSupport@reninc.com with the **Subject Line: Sign Your DAF Application.**

Please notify your client(s) they received a DocuSign email requiring their signature and must sign it right away.

Important
The Primary Advisors and listed Donors must sign before the account can move forward.



Flower Power Fund Status

Reference Code: DAF-2026-D079C76298884DDC9499A

Track the progress of your account setup.

Application Submitted Complete

Sep 28, 2026

Signatures Completed Complete

Sep 28, 2026

All required signatures have been collected. A confirmation has been sent to all signers.
Date Started: Sep 28, 2026

Signers required:

- marigold flowers (rakerm+126@reninc.com)
- Hirschel Abelson (rakerm+125@reninc.com)

Account Accessed in the Donor Portal Complete

Send Proof of Funding In Progress

The advisor team must submit proof that the investment account has been funded before the DAF account can begin recommending grants.

Submit Proof of Funding

Account Ready for Granting

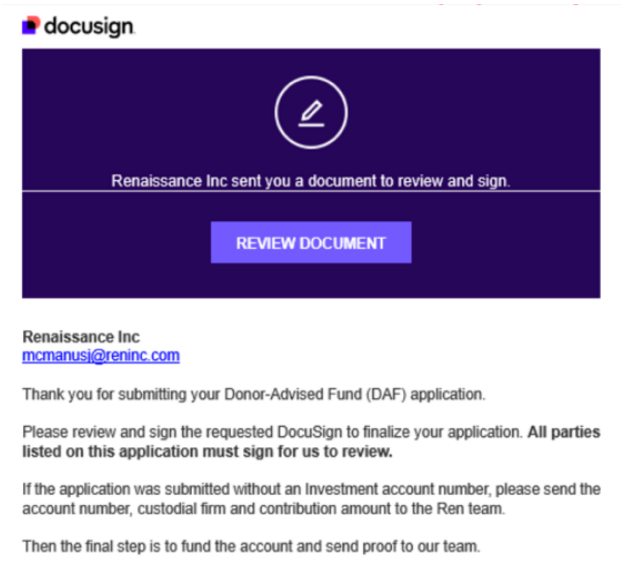
Your DAF account is fully set up, funded, and ready to make an impact. You can now begin recommending grants through the Donor Portal.

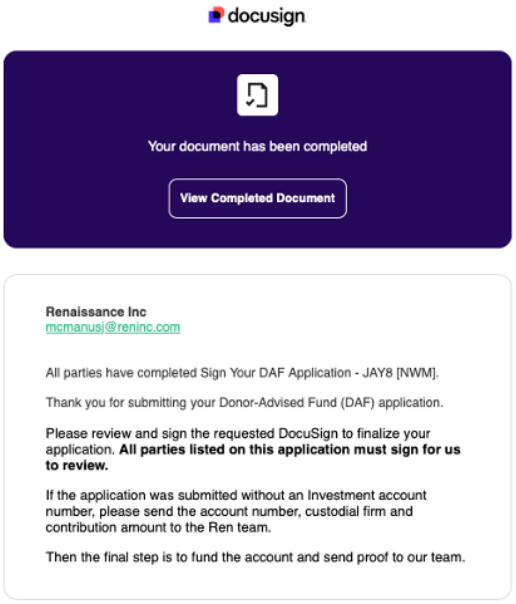
Signing the Application - DocuSign

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] - [ISP Code]





After the application is fully signed, submitting proof of funding is necessary for the account to be grant-ready. Download Guide.