5 Steps to Open an MS GIFT Donor Advised Fund Account

Opening an MS GIFT account is straightforward when you know what comes next. Follow these five steps to get your clients ready to give.



1. OPEN THE BRANCH ACCOUNT

Open a new branch account in 3D using account type MSG.

What happens next:

Initiate the execution of the DCA. eSign DCAs must be initiated from an open branch account.

NOTE: Make sure the DAF and names of Major Donor Persons on the branch account match the Donor Contribution Agreement. Because of character limits, the branch account name may be abbreviated.

2. COMPLETE THE DONOR CONTRIBUTION AGREEMENT (DCA)

Upload the signed DCA to the branch account for National New Accounts (NNA) approval.

What happens next:

NNA reviews and approves the DCA, and it then goes to Ren.

- Forms completed by eSign: once approved, agreements are automatically sent to Ren.
- Wet-signed forms: once approved, send the agreement to msimplementation@reninc.com. Please allow up to 3 business days for processing.

3. DONOR PORTAL ACCOUNT

Ren uses the information in the approved DCA to establish a Donor Portal account.

What happens next:

You'll receive an email confirming the account is set up and including instructions for the next step.

4. FUND AND INCEPT THE ACCOUNT

Follow the instructions in the email for funding and inception to either Select UMA or Portfolio Management.

What happens next:

If you fail to incept to an approved advisory program within 30 days of funding the account, it may be force-incepted to a firm discretionary UMA model. Once the account is funded and incepted, the account opening process is complete.

5. THE ACCOUNT IS OPEN AND READY FOR GRANTING.

Once funds are processed, the account is eligible for grantmaking.

What happens next:

Your client receives an invitation to access the account through Morgan Stanley Online (MSO) and the Donor Portal.

READY TO GET STARTED?

MS GIFT Account Opening Resources

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CRC #6052581 10/2026

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