

# Renaissance Charitable

## What Makes Us Different



# Benefits of Donor-Advised Funds



## Separate Tax Timelines from Giving Timelines

Log your charitable deduction when you need it, and distribute grants when charities need it. Easier decision-making, more attuned giving.



## Elevate Your Impact

Since invested assets grow tax-free, your gift can multiply for even greater impact in your community. Maintain your privacy as your gifting grows, if you choose.



## Streamline Donations

You or your advisor can recommend grants with just a few clicks and get automated updates. No more tracking down addresses, mailing checks, or tracking receipts.



## Lower Your Costs and Boost Impact

Lower fees, better tax treatment, and no overhead mean more funds reach communities.



## Reduce Administrative Burden

Skip the compliance, filings, and operations required of private foundations and give effortlessly with a DAF.



## Convert Without Losing Legacy

Shift a private foundation into a DAF seamlessly while preserving its mission and name.

# How Do Donor-Advised Funds Work?

DAFs are an intermediary charity account that helps you give on your terms.

## Contribution

You contribute cash, securities, or other assets to a DAF. Once you donate, you don't have to grant until you're ready. However, you do get an immediate tax benefit for the donation.

## Investment

The funds you contribute can be invested, growing tax-free over time. You have the flexibility to recommend how the funds are invested, depending on which philanthropies you want to support.

## Granting

Over time, you can recommend grants to qualified charities. We handle the administrative work, everything from due diligence on the charities to disbursing the grants.

# What Can Be Contributed to a DAF?

Asset Type	Accepted by Renaissance Charitable DAFs	Not Legally Acceptable to Any DAF
Common financial assets	Cash & cash equivalents, public equities, fixed income instruments, REIT shares, insurance & annuities	Margined securities
Private and business interests	C-Corp, S-Corp, partnership interests, PE/VC LP stakes, carried interest, hedge funds, alternatives, sole proprietorships, foreign traded stock	Business interests with a binding sale agreement
Tangible personal property	Real estate, art, jewelry, other collectibles, precious metals, farm crops, vehicles	Debt-encumbered real estate and/or assets with a binding sales agreement
Intangible assets	Cryptocurrency, royalties	Patents, copyrights, trademarks, other intellectual property



# Independence for Us Means More Flexibility for You

- Fully independent and unaffiliated with any wirehouse, broker-dealer, or investment firm, we work with any custodian so donors and their advisors can participate regardless of where their wealth is managed.
- Renaissance Charitable never restricts grantmaking based on philosophy. We focus on compliance with donor-advised fund regulations so donors can support the causes that matter most to them.



## Any Donor

With or without a financial advisor, from \$5K to \$50M and more, strategic giving starts here.



## Any Gift

From cash and public equities to private business interests, closely held stock, family heirlooms, collectibles, and more, we make every contribution possible.



## Any Investment

Your strategy, your custodian. Renaissance Charitable gives you more options than anywhere else, including any DAF-accepted investments and alternatives.



## Any Charity

Turn your vision into real-world impact. With millions of eligible charities, giving is centered around your goals. Our job is to make it as easy as possible.



# We’re not like the rest

Renaissance Charitable was built on the belief that donor-advised funds exist to serve donors, not restrict them. We make it easy to give how you want, when you want — with all the benefits of a DAF and none of the constraints.

	Renaissance Charitable Foundation	Brand Name Retail FI DAFs	Other Independent DAFs	Faith-Based DAFs	Community Foundation DAFs	Startup or Tech-Only DAFs
Contributions	<ul style="list-style-type: none"><li>• Cash and publicly traded securities</li><li>• Anything that can be legally accepted by a DAF, with an in-house expert team to guide you every step of the way.</li><li>• No due diligence fees.</li></ul>	<ul style="list-style-type: none"><li>• Institutional Limitations</li><li>• Cash and publicly traded securities</li><li>• Most complex assets accepted</li><li>• Typically, there is a due diligence fee</li></ul>	<ul style="list-style-type: none"><li>• Cash and publicly traded securities</li><li>• Most complex assets accepted</li><li>• Typically, there is a due diligence fee</li></ul>	<ul style="list-style-type: none"><li>• Cash and publicly traded securities</li><li>• Limited capabilities to accept and hold non-cash assets</li><li>• Typically, there is a due diligence fee</li></ul>	<ul style="list-style-type: none"><li>• Cash and publicly traded securities</li><li>• Limited capabilities to accept and hold non-cash assets</li><li>• Typically, there is a due diligence fee</li></ul>	<ul style="list-style-type: none"><li>• Cash and publicly traded securities</li><li>• Limited capabilities to accept and hold non-cash assets</li><li>• Typically, there is a due diligence fee</li></ul>
Investments	<ul style="list-style-type: none"><li>• Pooled accounts start at \$5K and do not require a financial advisor</li><li>• SMAs start at \$20K – manage all your client accounts in the same way</li><li>• Invest in alternative assets</li><li>• Hold concentrated positions</li></ul>	<ul style="list-style-type: none"><li>• SMAs typically start at \$100K,</li><li>• Pooled investment options at all levels</li><li>• Alts &amp; concentrated position policies may vary</li></ul>	<ul style="list-style-type: none"><li>• SMAs typically available at \$25K+; may also offer pooled options</li><li>• Discretion may be required</li><li>• Alts &amp; concentrated position policies may vary</li></ul>	<ul style="list-style-type: none"><li>• Often constrained by doctrine</li><li>• Typically offer a Pooled model</li><li>• May not allow or encourage financial advisor support</li></ul>	<ul style="list-style-type: none"><li>• Typically offer alimited set of pools</li><li>• May not allow or encourage financial advisor support</li></ul>	Often restricted to short list of investment pools
Granting & Charity Eligibility	<ul style="list-style-type: none"><li>• All eligible IRS-approved qualified charities and nonprofit organizations</li><li>• Automatic charity vetting enabling same-day approval of &gt;80% of grant recommendations</li><li>• Charity portal enabling digital payments that significantly reduce fraud and streamlining workload for charities</li></ul>	<ul style="list-style-type: none"><li>• All eligible IRS approved qualified charities and nonprofit organizations</li><li>• Grant review, approval, and payments may be fully manual, resulting in delays and risks</li><li>• No charity portal</li></ul>	<ul style="list-style-type: none"><li>• All eligible IRS approved qualified charities and nonprofit organizations</li><li>• Grant review, approval, and payments may be fully manual, resulting in delays and risks</li><li>• No charity portal</li></ul>	<ul style="list-style-type: none"><li>• All eligible IRS approved qualified charities and nonprofit organizations</li><li>• May be subject to philosophical constraints</li><li>• Grant review, approval, and payments may be fully manual, resulting in delays and risks</li><li>• No charity portal</li></ul>	<ul style="list-style-type: none"><li>• All eligible IRS approved qualified charities and nonprofit organizations</li><li>• May be geographically restrictive</li><li>• Grant review, approval, and payments are typically manual, resulting in delays and risks</li><li>• No charity portal</li></ul>	<ul style="list-style-type: none"><li>• All eligible IRS approved qualified charities and nonprofit organizations</li><li>• May exclude local or new charities not yet available in published IRS databases</li><li>• May have a limited charity portal</li></ul>
Technology	Built-for-purpose, enterprise-grade <u>giving platform</u> for donors & financial advisors, including giving summaries, drillable data, and transaction status updates in one place	Typically proprietary technology	Typically powered by third-party accounting and CRM technologies	Limited donor- and FA-facing features are typically powered by third-party accounting and CRM technologies	Limited donor- and FA-facing features; typically powered by third-party accounting and CRM technologies	Often strong user interfaces, but may be lacking from a security & compliance point of view
Service	<ul style="list-style-type: none"><li>• Tech-enabled account administration</li><li>• Live advisor and donor support</li><li>• White-glove service for large accounts available at no charges</li></ul>	<ul style="list-style-type: none"><li>• Tech-enabled account administration</li><li>• Live advisor and donor support.</li><li>• Some programs will offer white-glove service at no charge for large accounts</li></ul>	<ul style="list-style-type: none"><li>• Tech-enabled account administration</li><li>• Live advisor and donor support. Some programs will offer white-glove service at no charge for large accounts</li><li>• Some programs will offer white-glove service at no charge for large accounts</li></ul>	More limited due to smaller staffs. Typically live support during typical business hours.	<ul style="list-style-type: none"><li>• Many paper-based services</li><li>• More hand-holding at the donor level, especially in finding grant recipients</li></ul>	May not offer customer support
Fees	All-inclusive and competitive at all levels, including highly competitive standard pricing for individual accounts up to \$5B	Competitive for standard DAFs	Competitive for standard DAFs, custom for larger DAFs may mean repeated negotiations or inconsistent treatment	Often use embedded fees in addition to administrative fees, including investment spreads, transaction fees, and more	Typically highest administrative fees	Low in total \$ but often very high in %