

Checklist for Advisors: Supporting Charitable Giving through a Donor-Advised Fund (DAF)

At Partners in Care Foundation, we understand that philanthropy plays a key role in many clients' financial and legacy planning. To support financial and legal advisors in guiding their clients' charitable intentions, we have developed the following checklist for facilitating gifts from Donor Advised Funds (DAFs) to Partners in Care Foundation.

☐ **Discuss Philanthropic Goals**

Engage your client in a conversation about their charitable vision. What causes or impact areas are most meaningful to them? Our team can provide detailed information on current initiatives and programs that align with your client's interests and values.

☐ **Determine the Gift Structure**

Evaluate the most effective way to structure the DAF contribution. Based on the size of the gift and the program area the donor wishes to support, options may include a one-time outright gift or a multiyear pledge to support long-term impact.

☐ **Consider a Legacy Gift**

Encourage your client to consider naming Partners in Care Foundation as a final or successor beneficiary of their DAF. This designation allows donors to extend their philanthropic legacy and support our mission of improving the health and well-being of vulnerable populations for generations to come.

☐ **Provide DAF Grant Information**

When coordinating a gift through a DAF custodian, please reference the following:

Partners in Care Foundation
732 Mott Street, Suite 150
San Fernando, CA 91340
Email: development@picf.org
EIN: 95-3954057

We are here to assist you and your clients in giving with confidence and clarity. Should you have any questions or need further support, please contact us at development@picf.org.

We look forward to collaborating with you to create lasting impact through meaningful giving.