



Grant Recommendation Process for Financial Advisors

Step 1



Donor or their authorized individual, submits an online grant recommendation to AEF through DonorCentral.



Step 2



AEF performs due diligence, which includes qualifying the charity and validating the purpose of the grant.



Step 3



AEF sends the Letter of Authorization (LOA) to transfer funds to the Financial Advisors' designated recipient on file at AEF.



Step 4



Financial Advisor transfers the money via ACH to AEF.



Step 5



Grant is paid to the charity. A grant letter is sent to the charity, informing them of the grant and providing additional information if requested by the donor.



Step 6



Organizations benefit, change occurs, lives are enriched.