



How to Transfer Your Existing Donor-Advised Fund to AEF

Transferring your current donor-advised fund (DAF) from your existing administrator to American Endowment Foundation (AEF) is a simple and easy process to implement. After you have completed the steps for opening a new DAF at AEF, you will then complete the following:

- 1. Complete a grant request form from your existing DAF, no differently than when you make grants to the charitable causes that you support.**
- 2. On the grant request form, the grantee will be American Endowment Foundation FBO the Donor-Advised Fund's name. Our mailing address is: American Endowment Foundation, 5700 Darrow Road, Suite 118, Hudson, OH 44236**
- 3. To transfer the entire DAF amount, specify the grant amount to be "Fund Balance." This will ensure that the entire and current amount of your fund value at the time of the grant request will be transferred into your new DAF at American Endowment Foundation.**

Feel free to contact us anytime with any other questions that you may have, and our staff will help make this process as simple and easy as possible.