

# CapShift FlexDAF for Impact Program

**Find a donor advised fund provider that offers the flexibility you need to catalyze change.**

Donor advised funds (DAFs) are tax-efficient vehicles for individuals and families to make impact-aligned investments, including public market investments, private funds, and direct investments into social enterprises. Finding the right DAF partner can be challenging, with no easy way to compare provider services and fees, determine what investments can be approved, and manage ongoing oversight. CapShift's **FlexDAF for Impact Program** simplifies this process.

**FlexDAF** offers a web-enabled service to:

- Select the best provider for your needs, with access to discounted fees, if you do not already have an existing DAF account
- Facilitate adding public and private impact investment options
- Access DAFs simply with an integrated fee structure, reporting, and oversight

Donor advised funds are **personal giving accounts sponsored by public charities** that allow donors to make a charitable contribution, **receive an immediate tax deduction**, and then recommend investments and grants over time.

## The process is simple:

*All we need from you to get started is basic information on the types of impact investments you're interested in and if you're working with a financial advisor.*



We survey our network of leading third-party DAF providers and recommend 1-2 options for you – including clear benefits, restrictions, and one clear annual fee.



After you decide on a DAF provider, we facilitate account setup and the election of an external advisor if required.



You select your desired impact investments from a pre-approved list or recommend your own. Then you can use the CapShift web platform as an integrated interface to oversee your existing DAF impact portfolio.





## Questions?

Contact Scott Nance at [snance@capshift.com](mailto:snance@capshift.com)  
or [415-244-0460](tel:415-244-0460)

## Cost



We provide you with one simple quote that typically ranges from 45-125 bps per year on your impact-enabled DAF account, which includes all DAF administration and custom investment fees, often by accessing exclusive CapShift preferred pricing.

We work with multiple providers that can support a DAF account that is allocated 90% or more into a single private impact fund or company. We will provide a final quote after we understand your DAF use case.

## About CapShift

CapShift is an impact investing platform that empowers philanthropic and financial institutions, along with their clients, to mobilize capital for social and environmental change.

We combine a web-enabled platform with partnerships across a variety of donor advised fund sponsors, financial advisors, fund managers, and other partners to meet your unique impact investing needs. Our services are aligned with asset owners – we provide referrals to best meet your needs and take no referral or broker fees from DAF sponsors or fund managers.

CapShift was founded by Jacques Perold, former President, Fidelity Management & Research Co., and MissionPoint Partners, a leading impact investing advisor and asset manager. Investors in CapShift include the Heron Foundation, Omidyar Network, and other leading community development financial institutions (CDFIs) along with pioneering impact investing families. To learn more, visit [www.capshift.com](http://www.capshift.com).