

FLEXDAF® FOR IMPACT PROGRAM

Donor Advised Funds (DAFs) are efficient, tax-advantaged accounts that allow individuals, families, and organizations to conveniently manage their philanthropic activities, including charitable contributions and grantmaking. The process of identifying the best DAF provider to meet a donor's specific needs is complicated. There is no easy way to compare services, fees or investment policies that may limit a donor's options.

CapShift's FlexDAF® for Impact Program seamlessly assists donors by identifying the best-fit donor advised fund (DAF) provider, offering the flexibility needed to achieve a wide variety of philanthropic objectives. Our process includes clarifying each donor's philanthropic objectives, comparing providers, reviewing provider investment offerings, and overseeing account administration, all within one coordinated program. Donors are provided with one simple quote, bundling all fees and taking full advantage of CapShift's preferred pricing for an impact-enabled DAF account of \$500,000 or more with select partners. The FlexDAF® for Impact Program offers an end-to-end experience that is supportive, streamlined, and tailored to each donor by design.



WITH THE CAPSHIFT FLEXDAF® FOR IMPACT PROGRAM, YOU CAN...

- Select the best DAF provider for your needs
- Benefit from CapShift's preferred institutional pricing
- Allocate your philanthropic capital to a wide variety of impact investments and recoverable grant opportunities
- Propose your own impact investments
- Access a wide range of integrated DAF services
- Work with many of the leading national DAF providers or in our network of community foundations including Fidelity Charitable, National Philanthropic Trust, Chicago Community Trust and more

HOW IT WORKS



1. Talk to Us:

Discuss your philanthropic goals and impact interests with CapShift by contacting (617) 865-5096 or hello@capshift.com.



2. Request a FlexDAF® For Impact Proposal:

CapShift will create a custom proposal and recommend the DAF provider that best fits your needs, detailing all included services and fees.



3. Account Setup & Investment Execution:

CapShift manages set-up and funding of the new DAF account, including facilitating provider approval, document execution, and all asset and/or cash transfers.



4. Ongoing Oversight & DAF Reporting:

CapShift facilitates all investment and recoverable grant transactions on your behalf and provides ongoing support and reporting.

Questions? Contact hello@capshift.com or 617-865-5096.

ABOUT CAPSHIFT



CapShift is a leading impact investing platform whose mission is to put philanthropic capital to work for communities and the planet. We do this by providing rigorously researched, easy to access, and cost-effective impact investing and recoverable grant opportunities to donor advised fund holders, family offices, and foundations. Visit www.capshift.com to learn more about us and the capital that we have mobilized for purpose to date.

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