



*Festival of Children
Foundation*

Donor-Advised Funds

Executive Training Seminar

March 17, 2026



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MODERATOR



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Welcome, Introductions & Strategic Framing

Setting the context for the morning and framing donor-advised funds (DAFs) as a structural shift in philanthropic infrastructure.

The Background & Future of DAFs

Discussion with Eileen Heisman, Founding President & CEO of National Philanthropic Trust.
Exploring DAF growth, donor behavior, policy outlook, and what nonprofit leaders should prioritize.

DAFs in Practice: Family & Nonprofit Interaction

Conversation with Gregg Millward, Vice President & Client Advisor at Whittier Trust.
Examining how families use DAFs and what drives effective nonprofit engagement.

Peer Learning Exchange

A facilitated discussion on what's working (and not working) in engaging DAF donors, with practical insights from participants.

Optional Open Council & Strategic Discussion

An open conversation on broader fundraising and marketing strategy, building on the morning's themes.



Donor Advised Fund (DAF)

A **Donor Advised Fund** is a charitable giving account administered by a sponsoring organization that allows donors to make a charitable contribution, receive an immediate tax deduction, and recommend grants to nonprofits over time.



1. Contribution

Donor contributes cash, stock, or other assets to a DAF sponsor

2. Tax Benefit

Donor receives an immediate charitable tax deduction

3. Investment

Assets in the account can be invested and grow tax-free

4. Grant Recommendation

Donor recommends grants to qualified nonprofit organizations over time



A traditional gift:

Money moves → nonprofit receives → relationship continues

A DAF gift:

Assets move → sponsor holds → donor advises → grants flow later

The separation of contribution and distribution is the structural shift.



DAF assets have grown dramatically over the last decade

Billions of dollars now sit in DAF accounts nationally

Annual grantmaking from DAFs rivals major private foundations

Growth has outpaced many traditional giving vehicles

DAFs are no longer niche. They are mainstream philanthropic infrastructure.



Growth has been driven by:

- **Tax efficiency and capital gains planning**
- **Market appreciation**
Financial advisor recommendations
- **Simplified giving administration**
- **Intergenerational philanthropy planning**

DAFs align with modern wealth management behavior.



Eileen Heisman | Founding President & CEO of National Philanthropic Trust

Exploring DAF growth, donor behavior, policy outlook, and what nonprofit leaders should prioritize.



Gregg Millward | Vice President & Client Advisor at Whittier Trust

Examining how families use DAFs and what drives effective nonprofit engagement.



How is your organization identifying or tracking gifts coming from Donor Advised Funds?

Examples might include:

Coding DAF gifts/sponsors in your CRM

Flagging donor records tied to DAF accounts

Identifying advisor relationships

Recognizing patterns in grantmaking

Where has visibility improved — or remained difficult?

Have you adjusted your donor stewardship strategy because of DAFs?

Questions to consider:

How do you steward donors when gifts come anonymously?

Do you treat DAF donors differently than direct donors?

How do you maintain relationships when visibility is limited?

What has helped maintain connection?



Have you engaged advisors in your strategy?

Examples might include:

Advisor briefings

Relationship mapping

Educational events

Strategic introductions through donors

What role do advisors play in your fundraising approach today?



Treat DAFs as Permanent Philanthropy Infrastructure, Not a Trend

Donor Advised Funds are now a permanent part of philanthropy. The question is not whether they will grow, but how organizations adapt their strategies to operate within this structure.



Track DAF Activity in Your CRM

Many organizations underestimate how much giving is coming through DAFs because it is not coded properly. Tracking sponsors such as Fidelity, Schwab, Vanguard, and community foundations helps reveal patterns and repeat donors.

Remember That a DAF Gift Still Starts With a Donor

A DAF gift may arrive through a sponsor, but a person or family is still behind the decision. Fundraising should focus on engaging that donor relationship, not simply processing the gift.

Ask Donors About Their Giving Vehicles

Many donors will mention their DAFs if asked directly. Simple questions such as “Do you use a donor advised fund for your giving?” can improve visibility into your donor base.

Recognize the Role of Financial Advisors

Financial advisors often influence how and when DAF gifts are made. Building awareness and relationships with advisors in your community could help.

Accept That Some Gifts Will Be Anonymous

Anonymity is a feature of many DAF accounts. While it can create challenges for relationship building, organizations can still steward broadly by communicating impact and maintaining strong visibility in the community.

Offer Clear and Strategic Funding Opportunities

DAF donors often allocate gifts strategically across multiple organizations. Clear initiatives, defined outcomes, and multi-year opportunities make it easier for donors to deploy funds.



Engage Your Board

Many board members already give through DAFs. Encouraging board conversations about how they use their DAFs can uncover new insights and potential introductions to advisors or peers.

Focus on Relationships, Not Just Channels

DAFs change how money moves, but they do not change why donors give.

Organizations that prioritize trust, transparency, and meaningful engagement will remain competitive regardless of the giving vehicle.





ABOUT THE PRESENTER

Derrick Feldmann is an internationally recognized researcher and advisor on social issues, movements, and public action. His insights are sought by organizations and media worldwide, and he produces nearly two dozen research projects each year. He has authored three books, including *The Corporate Social Mind* and *Social Movements for Good*, and previously led the Millennial Impact Project with The Case Foundation, producing landmark reports on generational engagement with causes. Feldmann now splits his time between ISG and the Ad Council Research Institute, where he oversees studies on pressing American issues. He is also a Visiting Research Fellow at Oxford's Saïd Business School, Chair of the Board of Visitors at Indiana University's Lilly Family School of Philanthropy, and a frequent writer and speaker.



ABOUT FESTIVAL OF CHILDREN FOUNDATION

Festival of Children Foundation supports children's charities by serving as a hub that connects, strengthens, and champions nonprofit organizations dedicated to improving the lives of children. Through collaborative partnerships, capacity-building programs, advocacy, and access to vital resources, the foundation empowers charities to amplify their impact and reach more children in need – all at zero cost to the organizations. Our mission is rooted in the belief that every child deserves the opportunity to grow up safe, healthy, educated, and inspired, and by uniting diverse organizations under a shared vision, the foundation helps ensure that children's voices and needs remain a priority in communities across the nation.