



Donor Advised Fund Checklist for Advisors

We understand that charitable giving is an important part of a donor's overall financial plan. That's why we have created this checklist for advisors who want to help their clients give from a donor advised fund (DAF) to City of Hope®.

Speak with your client about how they might like to designate their gift according to what they are passionate about. Our team can provide a list of initiatives and impact areas that match your client's interests.

Determine the best way for your client to structure a gift from their DAF. Depending on the size of the gift and the project they would like to support, donors may want to consider a combination of outright gifts and multiyear pledges.

Ask your client if they would like to make City of Hope an ultimate beneficiary of their DAF. Doing so will allow them to deepen their support and amplify their legacy of helping find cures for cancer and other life-threatening illnesses.

When coordinating a grant to City of Hope with your client's DAF custodian, please reference the following information:

City of Hope

1500 E. Duarte Road

Duarte, CA, 91010

800-232-3314

plannedgiving@coh.org

EIN: 95-3435919

We are here to help you and your clients to give with confidence. If you have any questions or need assistance, please do not hesitate to contact us at plannedgiving@coh.org or **800-232-3314**. We look forward to working with you.