

## **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 Catholic Education Arizona's **Changing Lives with Legacy Division**.

- 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 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 multi-year pledges.
- Ask your client whether they would like to designate Changing Lives with Legacy as the ultimate beneficiary of their DAF. Doing so will allow them to create their legacy of caring support for their community.
- When coordinating a grant to Changing Lives with Legacy with your client's DAF custodian, please reference the following information:

**Changing Lives with Legacy Division**  
5353 N 16th St, Suite 330, Phoenix AZ, 85016  
Phone: (602) 218-6542  
Email: [legacy@ceaz.org](mailto:legacy@ceaz.org)  
EIN: 86-0937587

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. We look forward to working with you.