



DONOR ADVISED FUND TOP TEN TIPS for 2022

10 FIND ANSWERS IN THE UPDATED TRF DAF Program Circular
[linked here](#)

9 RESET YOUR PASSWORD

Just click on the [Forgot Your Password Link](#)

8 REVIEW INVESTMENT ACTIVITY & QUARTERLY STATEMENTS ONLINE anytime from your DAF account page! To access the statement, hover on the “Investments Tab” and click on “Most Recent Quarterly Statement.”

7 RECEIVE IMPORTANT INFORMATION AND TIMELY REMINDERS

Add plannedgiving@rotary.org to your approved senders list to get important and timely reminders and make sure to send us any changes to your email address(es) at plannedgiving@rotary.org

6 TAKE ACTION BY INCLUDING TRF DAF ON YOUR GLOBAL GRANT APPLICATION

Please find important guidelines for using The Rotary Foundation Donor Advised Fund for Global Grants at [this link](#)

5 HELP ROTARY LIFT UP LOCAL COLLEGE STUDENTS

If your DAF will be recommending grants to a Community or Technical College please email plannedgiving@rotary.org with details. We can benefit from your experience supporting low-income students locally.

4 ANNUAL DISCLOSURE

Contributions to The Rotary Foundation Donor Advised Fund are the sole property of The Rotary Foundation.

3 SUPPORT THE [Rotary Disaster Response Fund](#) BEFORE DISASTER STRIKES

2 EFFICIENTLY UPDATE ACCOUNT INFORMATION using the [Account Advisor Change Request](#)

1 CONNECT WITH OUR DEDICATED TRF DAF SPECIALIST

TRF Donor Advised Fund Specialist, MacKenzie Condon, can be reached by emailing plannedgiving@rotary.org

Thank you for managing your philanthropy with The Rotary Foundation Donor Advised Fund. We are excited to share that The Rotary Foundation has been named a four-star charity for the 14th year in a row by Charity Navigator. You are a valued part of Rotary and the success we share around the world.