Founders Pledge

Give more, better:
UK Donor Advised Fund (DAF)

July 2026

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Introduction

About Founders Pledge

We're a global nonprofit empowering entrepreneurs to do the most good possible with their charitable giving. We equip our community of members with everything they need to maximize their impact, from high-impact giving recommendations and one-to-one philanthropic advising, to a tax-efficient Donor Advised Fund and events with fellow entrepreneurs and experts around the world. As of June 2026, our 2,300+ community has **pledged over $13.6 billion** to charity, and **donated more than $1.9 billion** to the charitable sector. As a nonprofit organization, we're grateful to be funded by our members and other generous donors.

About our Donor Advised Fund

Think of a Donor Advised Fund (DAF for short) as a charitable bank account we make available to our members. It's a **flexible and efficient giving vehicle** for you to support nonprofits of your choice on the timeline that's right for you. DAFs also maximize how much you are able to give by accepting a wide variety of tax-advantaged assets, including private and public stock. Upon contribution, the proceeds of liquidated assets can be invested into diversified growth pools tax-free.

A few unique features:

Strategic Guidance: Personalized philanthropic advisory services to maximize your long-term impact.

High-impact Funds: Strategically focussed cause areas through extensive research.

Simplified Logistics: We take care of your grant processing and due diligence, so you can focus on where to give.

Discounts for high-impact giving: Grants to Founders Pledge-recommended high-impact charities are exempt from grant processing fees and can result in reduced admin fees.

Peer Network: When you also sign our pledge, you gain access to a powerful global community committed to effective giving.

How our UK DAF works

- Donate diverse assets & benefit from any available tax relief
- Invest funds so they can grow tax free while you decide where to give*
- Get 1:1 guidance to give more effectively
- Securely grant around the world

*Premium DAF Account holders only.

Problem

Giving can come with a lot of admin, whether that's figuring out how to tax-efficiently donate assets, keeping track of your donations, vetting organizations, or navigating global regulations.

Solution

A tax-efficient giving account that makes it seamless to give anywhere in the world, whether you're donating £10k or £100m. We handle all the logistics and due diligence. Meanwhile, you can manage all of your giving in one place via the Founders Pledge Web App.

Benefits of our UK DAF

You'll have more to give

Tax-efficient giving

Fund your charitable goals with multiple asset types. Your donations may be eligible for Gift Aid.

Investment options (for Premium DAF account holders only)

Choose from multiple investment options to suit your grant-making time horizon and desired risk profile, so that your funds can grow tax-free while you give.

We minimize your admin

Everything in one place, in a few clicks

Let us streamline your giving by handling all of the logistics. You can manage all your contributions and grants in one place via the Founders Pledge Web App, and give access to important partners, including family and external advisors.

Unparalleled due diligence

With our rigorous due diligence, you can rest assured every grant you make is secure and compliant with applicable regulations.

Benefit from our unique expertise

Give around the world, at any scale

Our team are leaders in facilitating global and complex grants, so you can give to innovative projects in 50+ countries with confidence.

Comprehensive support

Make the most of your DAF with our other services: high-impact funding recommendations vetted by our Research team; 1:1 philanthropic advising tailored to your goals; and unique events with fellow entrepreneurs around the world.

DAF Account basics

Account Basics and Management	
Charity registration	Founders Pledge Ltd (UK), No. 1162201
Administered by	Founders Pledge
Legacy planning	Yes, you can set up a succession plan for your DAF
Third-party account access	Donors can give others (partners, family, financial and philanthropic partners) varying levels of access to their DAF
Minimum amount to open account	For Founders Pledge members and partner organizations: £/$/€10,000. If you're not currently a member or from a partner organization, please contact us.
Currency accepted	GBP, EUR, USD
Spend down policy	None: spend down at donor's chosen pace.
Account options	We offer the option to choose between a Premium or Core DAF. (see page 6 for details)

DAF Granting basics

Grants

Grant value minimums and fees apply to grants from both Premium and Core DAFs.

Grant Value Minimums[1]	Domestic (UK)[2]	£/$/€1,000
	International	£/$/€10,000
	FP Recommendation (regardless of grantee location)	£/$/€1,000
Grant Processing Fees Our grant processing fees cover the transaction costs associated with issuing grant payments from the UK.	UK Domestic Grants under £500,000 (or $670,000 / €580,000)	No Fee
	UK Domestic Grants of £500,000 (or $670,000 / €580,000) or more	£25 per grant ($35 / €30)
	UK International Grants (all values)	£25 per grant ($35 / €30)
	Zero fees for any grants to our High-Impact recommended charities, FP Pooled Thematic Funds ↗, or to FP Operating Expenses.	
Granting Timelines	Domestic (US or UK)	2–5 Business Days
	International	1–3 Weeks[3]

[1] To make grants, the account balance must cover the grant amount requested and any related fees. To mitigate market risk, any grant request that brings your DAF balance below 20% of its current level may take longer to process.
[2] Grants are domestic if made to organizations within the DAF's jurisdiction (e.g. granting from a UK DAF to a UK registered charity) and international if made to organizations outside the DAF's jurisdiction (e.g. granting from a UK DAF to a US 501(c)(3)).
[3] International timelines vary based on the responsiveness of the grantee and the complexity of the local jurisdiction.

Premium & Core UK DAF Options

Founders Pledge UK DAF

A Premium DAF account offers a range of investment options to grow your DAF funds tax-free, accepts a wider range of asset types, and charges a modest administrative fee. A Core DAF account does not charge an administrative fee, but does not offer investment opportunities. Core DAF assets will be invested in low-risk liquidity funds, and the gain or loss is allocated to Founders Pledge's Operating Expenses. The only time your DAF balance will change with a Core DAF Account is when you make a contribution or make a grant.

	Premium	Core
Option to donate complex assets (incl. Private shares)	Yes	No
Investment options[4]	Yes	No
Admin fees	Yes (see page 7)	None
Grant Processing Fees	Yes (see page 5)	Yes (see page 5)
Assets Accepted[5]	Cash, Public Securities (restricted and unrestricted), Crypto, Private Company Shares	Cash, Public Securities (unrestricted only), Crypto

[4] Consult pages 10 to 13 of this pack for details, including investment descriptions, performance, and fees.

[5] Founders Pledge does not charge any contribution acceptance fees of its own. However, we generally pass through third-party costs associated with accepting and processing certain asset types, including due diligence costs for private shares and any brokerage or processing fees associated with cryptocurrency or publicly traded securities donations. For crypto and public securities, these costs are typically deducted from the net proceeds realized upon liquidation. Our policy is to liquidate non-cash assets as soon as reasonably practicable following receipt.

UK DAF Admin Fees

Our admin fee structure is tiered and progressive — meaning the more you contribute, the lower your overall fee rate becomes. Our admin fee is annualised and charged monthly based on your average monthly DAF balance.

Fund Balance Tier	Annual Fee Rate
First £375,000	0.45%
Next £375,000 (£375k to £750k)	0.30%
Next £1,125,000 (£750k to £1.875M)	0.25%
Next £1,875,000 (£1.875M to £3.75M)	0.20%
Next £3,750,000 (£3.75M to £7.50M)	0.15%
Amounts over £7.50M	0.05%

Admin fees example

Example for an average monthly DAF balance of £8m:

- **First £375,000:** Charged at 0.45% = £1,687.50
- **Next £375,000** (from £375k to £750k): Charged at 0.30% = £1,125.00
- **Next £1,125,000** (£750k to £1.875M): Charged at 0.25% = £2,812.50
- **Next £1,875,000** (£1.875M to £3.75M): charged at 0.20% = £3,750.00
- **Next £3,750,000** (£3.75M to £7.50M): charged at 0.15% = £5,625.00
- **Remaining £500,000** (over £7.5m): charged at 0.05% = £250.00

Total Annualized Fee: £15,250 (which averages out to an effective rate of 0.19%)

Premium DAF Discounts

Impact is at the heart of everything we do. To encourage giving that does the most good, we discount or completely waive administrative fees when you support our mission.

When you make a grant to our High-Impact Funding Opportunities, Founders Pledge Thematic Funds, or directly to our Operating Expenses, you unlock the following benefits:

Premium DAF Discounts:

- **Discounted Monthly Admin Fees**
  We calculate your monthly admin fee using an "adjusted balance" (your average monthly balance minus your grant amount). If this adjusted balance drops to zero or below, your admin fee for that month is waived entirely.

- **Total Admin Fee Waiver**
  We will automatically waive your monthly admin fee if you have granted £20,000 or more to our Operating Expenses over the past 12 months.

Donating privately held shares

Founders Pledge works with donors and their advisors to make donating privately held shares smooth and efficient.

Estimated Timeline:
3 to 6 weeks (longer for complex capital structures or Right of First Refusal clauses).

Eligible Assets: UK-registered Private Limited Companies, unlisted PLCs, LLPs, and unlisted Foreign Shares.

Note: A £375,000/$500,000 minimum applies to contributions of private shares.

1 Initial Discovery

We discuss the asset type being considered for donation. While we primarily accept standard private shares, other complex assets may be accepted at our discretion.

2 Due Diligence and Valuation

We solicit third-party legal and risk management advice to review the asset's legal and financial standing.

- **Costs:** Typically £2.5k–£10k (more for complex structures). These fees are passed on regardless of final acceptance.
- **Valuation:** We require initial and ongoing valuations for UK statutory compliance. We use recent company third-party valuations when available, or standard financial methodologies (DCF, NAV, multiples) if not.
- **Registration:** Founders Pledge must be added to the company's shareholder register and receive standard shareholder communications.

3 Review, Acceptance, and Transfer

Once due diligence is complete, our Investment Committee reviews the proposal and shares a recommendation with our Trustees who decide whether to accept the asset.

- **Decision Timeline:** Generally within 3 weeks of FP receiving full diligence documentation.
- **Transfer Finalization:** Upon approval, we coordinate the share transfer which can take another 2-3 weeks* and issue a donation receipt upon its completion.

4 Holding and Liquidity

Founders Pledge holds and administers the shares within the donor's DAF.

- **The 5-Year Horizon:** We accept shares with the expectation of a liquidity event within 5 years. If this doesn't happen, we will discuss extensions or transferring the asset to an alternative DAF provider.
- **Administrative Fees:** We generally ask for five years' worth of estimated admin fees at the time of donation, which removes the need of annual reminders for supplementary cash donations while the private shares remain illiquid.
- **Liquidation Control:** The timing and manner of the ultimate share sale remain at the sole discretion of Founders Pledge.

*Subject to the timing of company share transfer processes.

Investment options

We offer four investment pools to suit a variety of grant-making time horizons and risk profiles:

- **Liquidity Fund**
- **Conservative**
- **Balanced**
- **Dynamic**

You can find out more about each pool, including historical returns*, expense ratios, and underlying securities, on the following pages.

Our UK DAF offering is available in GBP, USD, and EUR currencies. The investment options available for each currency are outlined below.

Account Type	Invest in Conservative, Balanced, and Dynamic	Invest in Liquidity Fund
UK GBP DAF	Yes	Yes
UK USD DAF	Yes	Yes
UK EUR DAF	No	Yes

Investment Fees

Investment advisory fees and expense ratios are assessed by our external investment manager on a quarterly basis net of returns. A Total Expense Ratio (incl. advisory fee) of up to 47 bps is applied to the Conservative, Balanced, and Dynamic portfolios. A Total Expense Ratio (incl. advisory fee) of 27 bps is applied to the Liquidity Fund.

Expense ratios for each of our funds are based on the allocation of underlying securities and may change if there is a change to the allocation strategy. The fees, performances, and asset allocations on the following pages are accurate as of the end of July 2026.

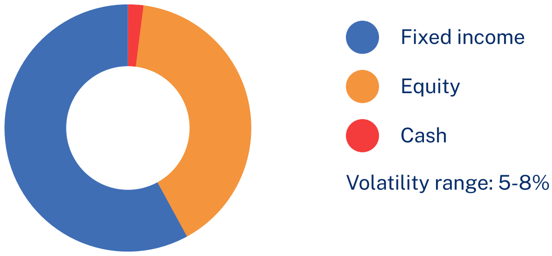
*Returns are based on currently available information and are subject to revision. Past performance is no guarantee of future results. Five-year returns are annualized.

Investment options explained

Liquidity Fund

Available for accounts held in: GBP, USD and EUR

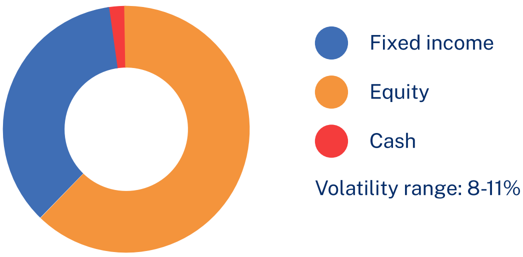
This fund prioritizes liquidity and capital protection, similar to money market funds, by investing in a diversified range of high credit-rated, short-term fixed and floating rate securities, including commercial paper and certificates of deposit.



Conservative

Available for accounts held in: GBP, USD

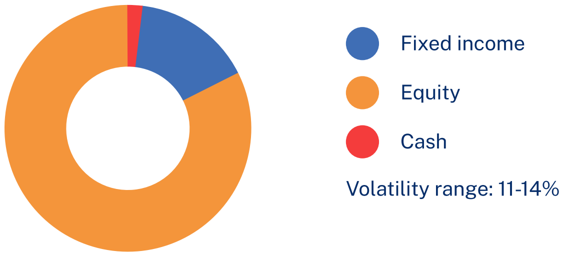
This portfolio seeks to preserve principal and generate modest income, ideal for donors who plan to recommend grants within 2 years[6].



Balanced

Available for accounts held in: GBP, USD

This portfolio seeks modest, long-term growth through a diversified portfolio, ideal for donors who plan to recommend grants in the next 2-5 years[6].



Dynamic

Available for accounts held in: GBP, USD

This portfolio seeks long-term growth, ideal for donors who plan to start recommending grants in 5 years or more. With 82.5% allocated to equities, the portfolio has short-term volatility and principal risk, and may lose value in the short-term. [6].

[6] The portfolio aims to maintain the following allocation subject to market performance at the discretion of our banking partner, HSBC Private Bank.

Liquidity Fund

GBP Liquidity Fund

Performance [7]

3-Month: **3.77%**

1-Year: **4.05%**

5-year: **3.44%**

USD Liquidity Fund

Performance [7]

3-Month: **3.69%**

1-Year: **4.09%**

5-year: **3.66%**

EUR Liquidity Fund

Performance [7]

3-Month: **2.03%**

1-Year: **2.05%**

5-year: **1.95%**

Conservative

Available for accounts held in: GBP, USD

Performance[7]

3-Month: **2.29%**

1-Year: **14.00%**

5-year: **4.42%**

Equity: 40%

Global Equity: 3.1%

UK Equity: 1.3%[8]

US Equity: 20.6%

Europe ex UK Equity: 4.3%[9]

Japan Equity: 1.9%

AsiaPac ex Japan Equity: 1.1%

Emerging Equity: 3.7%

Listed Property: 4%

Fixed income: 58%

Global Government Bond: 37%

Investment Grade Corporate: 21%

Cash: 2%

Volatility range: 5-8%

[7] Cumulative returns net of fees (%). Past performance is no guarantee of future results.

[8] Only applicable to GBP accounts. For USD accounts the UK equity allocation will be invested into Europe ex UK Equity([9]).

Balanced

Available for accounts held in: GBP, USD

Performance [7]

3-Month: **4.13%**

1-Year: **20.22%**

5-year: **7.19%**

Equity: 62.5%
Global Equity: 4.9%
UK Equity: 2%[8]
US Equity: 32.2%
Europe ex UK Equity: 6.7%[9]
Japan Equity: 2.9%
AsiaPac ex Japan Equity: 1.7%
Emerging Equity: 5.9%
Listed Property: 6.3%

Fixed income: 35.5%
Global Government Bond: 22.4%
Investment Grade Corporate: 13.1%

Cash: 2%

Volatility range: 8-11%

Dynamic

Available for accounts held in: GBP, USD

Performance[7]

3-Month: **5.71%**

1-Year: **25.87%**

5-year: **9.62%**

Equity: 82.5%
Global Equity: 6.5%
UK Equity: 2.7%[8]
US Equity: 42.5%
Europe ex UK Equity: 8.8%[9]
Japan Equity: 3.8%
AsiaPac ex Japan Equity: 2.2%
Emerging Equity: 7.7%
Listed Property: 8.3%

Fixed income: 15.5%
Global Government Bond: 9.4%
Investment Grade Corporate: 6.1%

Cash: 2%

Volatility range: 11-14%

[7] Cumulative returns net of fees (%). Past performance is no guarantee of future results.
[8] Only applicable to GBP accounts. For USD accounts the UK equity allocation will be invested into Europe ex UK Equity([9]).

Founders Pledge

Ready to give more, better?

Check out our website
Get in touch to discuss your options