

Give more, better:

US Donor Advised Fund (DAF)

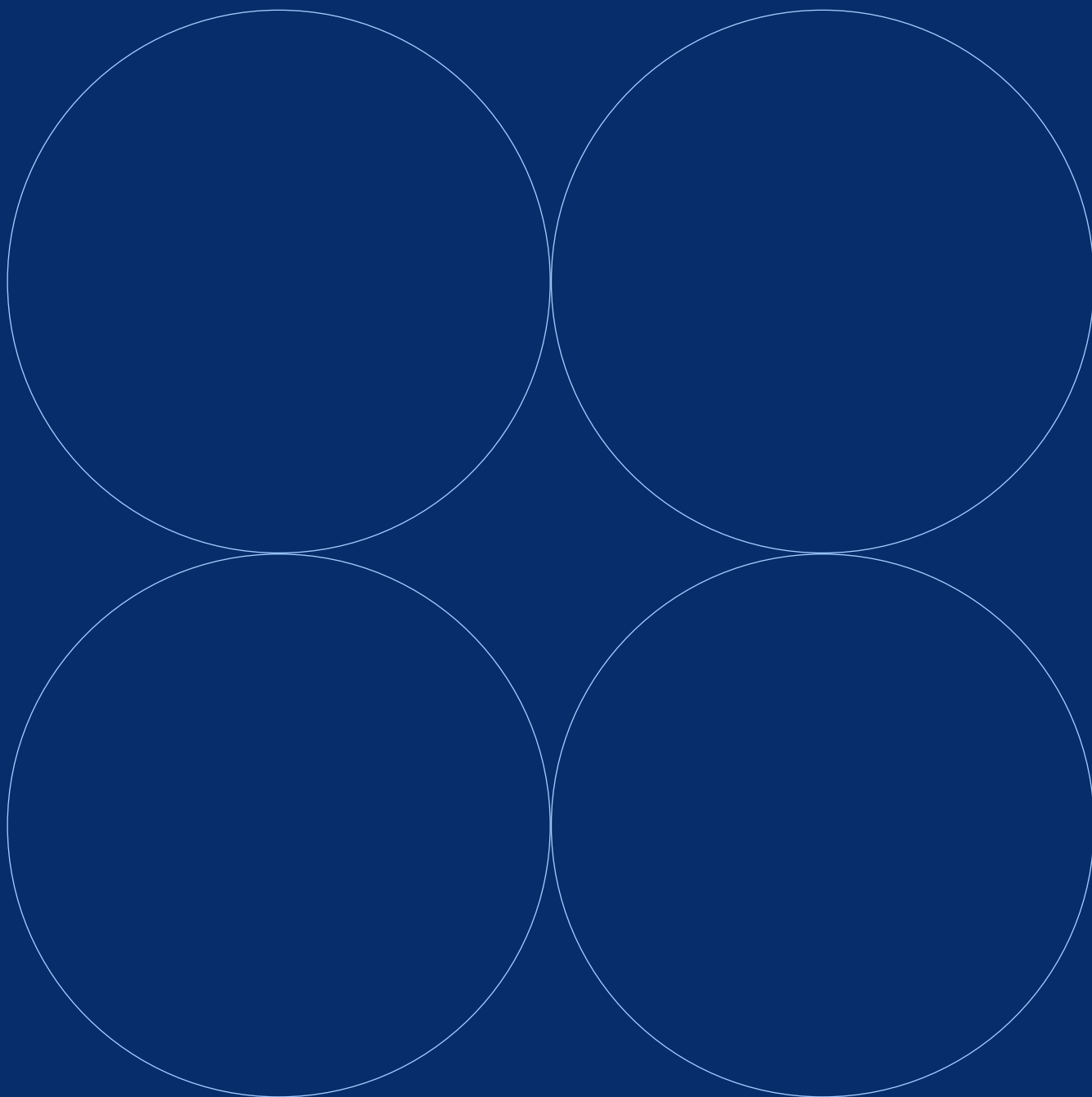




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Introduction

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, allowing you to invest those assets so they may grow tax free. Currently our US DAF is only available to Founders Pledge Members and partner organizations.

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.

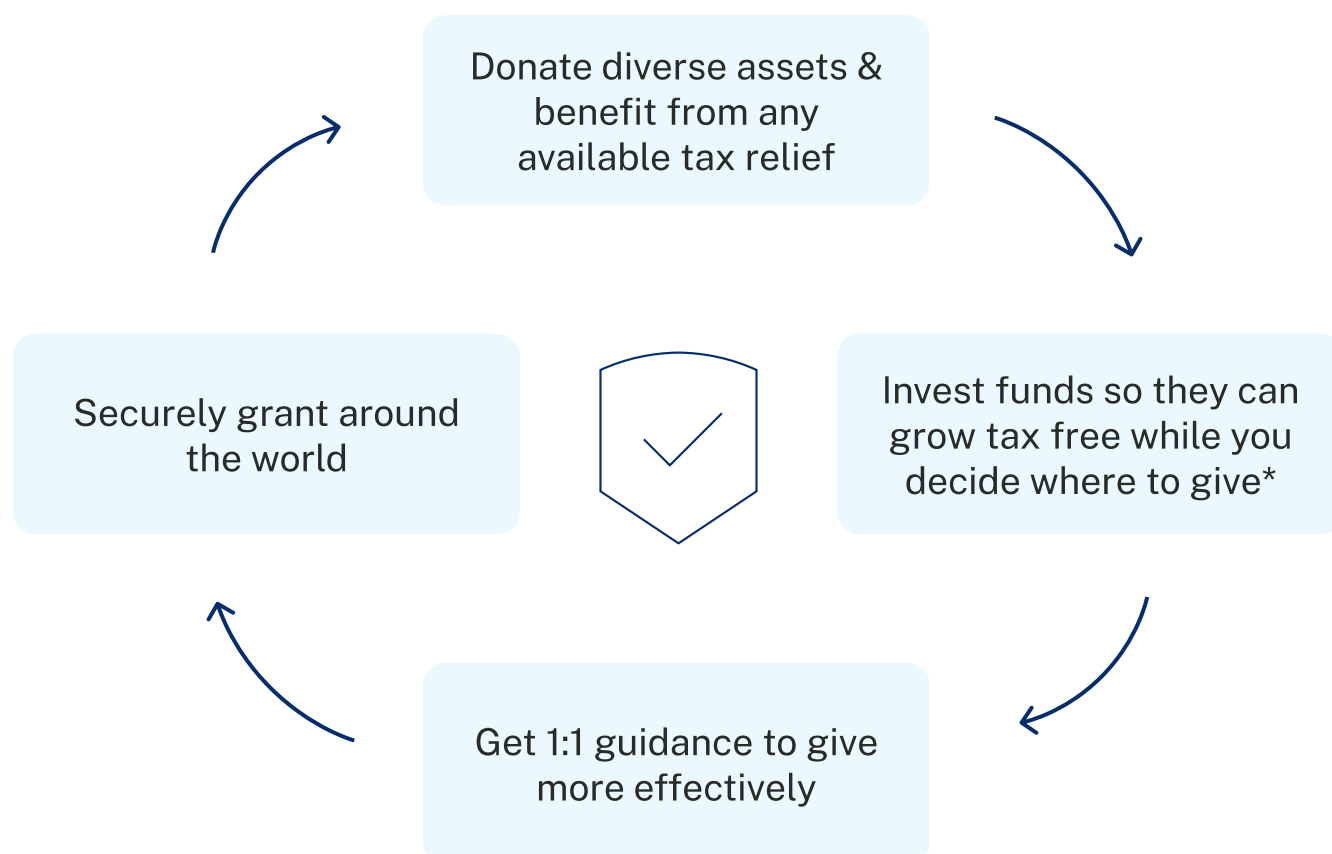
Simplified Logistics: We take care of your grant processing and due diligence, so you can focus on where to give.

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 US DAF works



*Premium DAF Account holders only.

! Problem

Giving can come with a lot of admin, whether that's figuring out how to donate tax-optimized 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 US DAF

You'll have more to give



Tax-efficient giving

Fund your charitable goals with diverse assets (including public and private securities, crypto and more), and receive an immediate tax deduction when you contribute to your DAF.



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 Inc (FPI), a US 501(c)(3) public charity
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: \$10,000. Minimum to open an account for partner organizations may vary. If you're not currently a member or from a partner organization, please contact us .
Currency accepted	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 Minimums¹	Domestic	\$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 US, including applicable third party costs for international granting	Domestic Grants	\$5
	International Grants	\$1,000
	Zero fees for any grants to our High-Impact recommended charities, FP Pooled Thematic Funds ² , or to FP Operating Expenses.	
Granting Timelines	Domestic	2–5 Business Days
	International	1–6 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 US DAF to a US 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. Repeat grantees can be paid in as little as 1-3 days, first time international grants require additional due diligence.



Premium & Core US DAF Options

Founders Pledge US 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 options⁴	Yes	No
 Admin fees	Yes (see page 7)	None
 Grant Processing Fees	Yes (see page 5)	Yes (see page 5)
 Assets Accepted⁵	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 these assets as soon as reasonably practicable following receipt.



US 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 \$500,000	0.45%
Next \$500,000 (\$500K to \$1M)	0.30%
Next \$1,500,000 (\$1M to \$2.5M)	0.25%
Next \$2,500,000 (\$2.5M to \$5M)	0.20%
Next \$5,000,000 (\$5M to \$10M)	0.15%
Remaining amounts over \$10M	0.05%

Admin fees example

Example for an average monthly DAF balance of \$10.5M:

- **First \$500,000:** Charged at 0.45% = \$2,250.00
- **Next \$500,000** (from \$500K to \$1M): Charged at 0.30% = \$1,500.00
- **Next \$1,500,000** (\$1M to \$2.5M): Charged at 0.25% = \$3,750.50
- **Next \$2,500,000** (\$2.5M to \$5M): charged at 0.20% = \$5,000.00
- **Next \$5,000,000** (\$5M to \$10M): charged at 0.15% = \$7,500.00
- **Remaining \$500,000** (over \$10M): charged at 0.05% = \$250.00

Total Annualized Fee: \$20,250 (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 \$25,000 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: US LLP, LLC, C-corp entities and Unlisted Foreign Shares (subject to FP review).

Note: A \$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 \$5K–\$15K (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:

- **Money Market**
- **Conservative**
- **Moderate**
- **Moderately Aggressive**

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

We can explore working with existing US Registered Investment Advisors to manage a DAF's investments, subject to vetting and approval by Founders Pledge's Investment Committee, third-party investment manager agreement, and adherence to Founders Pledge's Investment Policy.

Investment Fees

Investment advisory fees and expense ratios are assessed by our external investment manager on a quarterly basis net of returns. Expenses reflect the expense ratios of the underlying ETFs. An investment advisory fee of 15 bps is applied to the Conservative, Moderate, and Moderately Aggressive portfolios. There is no advisory fee for Money Market. 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 page are accurate as of 31 May 2026.



Investment options explained

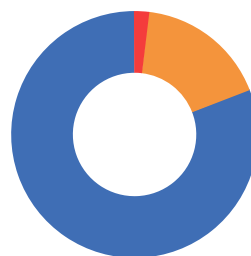


Expense Ratio: 18 bps

- Fixed income

Money Market

This fund (SEGXX) prioritizes liquidity and principal protection by investing in high-quality, low-risk US government money market instruments.

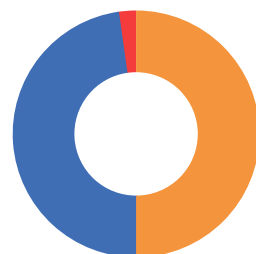


Expense Ratio: 9 bps

- Fixed income
- Equity
- Cash

Conservative

This portfolio seeks to preserve principal and generate modest income, ideal for members who plan to recommend grants **within 2 years**.

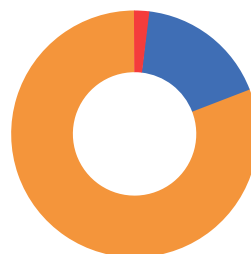


Expense Ratio: 8 bps

- Fixed income
- Equity
- Cash

Moderate

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



Expense Ratio: 7 bps

- Fixed income
- Equity
- Cash

Moderately Aggressive

This portfolio seeks long-term growth, ideal for members who plan to start recommending grants **in 5 years or more**. With 70% allocated to global equities, the portfolio has short-term volatility and principal risk, and may lose value in the short-term.



Conservative

Expense Ratio: 9 bps

Performance⁶

3-Month: **0.23%**

1-Year: **10.14%**

Since Inception: **9.31%**



Equity: 17%
US Equity: 11%
Developed (Ex-US) Equity: 6%



Fixed income: 81%
US Government Fixed Income: 38%
Investment Grade Credit: 30%
High Yield Bonds: 6%
Emerging Market Debt: 7%



Cash: 2%

Moderate

Expense Ratio: 8 bps

Performance⁶

3-Month: **3.44%**

1-Year: **19.17%**

Since Inception: **15.43%**



Equity: 50%
US Equity: 28%
Developed (Ex-US) Equity: 16%
Emerging Markets Equity: 6%



Fixed income: 48%
US Government Fixed Income: 19%
Investment Grade Credit: 17%
High Yield Bonds: 6%
Emerging Market Debt: 6%



Cash: 2%

Moderately Aggressive

Expense Ratio: 7 bps

Performance⁶

3-Month: **5.24%**

1-Year: **24.29%**

Since Inception: **18.49%**



Equity: 70%
US Equity: 37%
Developed (Ex-US) Equity: 24%
Emerging Markets Equity: 9%



Fixed income: 28%
US Government Fixed Income: 8%
Investment Grade Credit: 12%
High Yield Bonds: 5%
Emerging Market Debt: 3%



Cash: 2%

⁶ Returns are based on currently available information and are subject to revision. Past performance is no guarantee of future results.

Ready to give more, better?

Check out [our website](#)

[Get in touch](#) to discuss your options

