Manage DAF assets in-house

Maintain AUM and control, while encouraging your clients to give

Leverage **Advisor-Managed Portfolios on Endaoment** to design and manage your clients' donor-advised fund investments within your existing strategies and workstation. By maintaining oversight of charitable assets, you'll deepen client relationships while **retaining more AUM**.

Our platform **seamlessly integrates with your practice**, allowing you to offer clients comprehensive and dynamic wealth management, including philanthropic planning.

	Donating to	Stock Donation
High-tech Financial Adviso	rs × \$20.0k Position Value	Advisors, LLC
Expense Rate	Ian 1st, 20	Donation Details
Quarterly Performance: +1.4% Sep 1st, 2022	\$79.	50
Oct 1st, 2023 \$78.80 Change for a Dollar Fund		Remove Vumber of Shares 5.0 pyee Stock Plan
 \$20,000 position value \$20,000 in other allocations 	♦ \$171,400 granta Edit Posit	
\$2,000 in transit ?	Recommend Dor	nation 🗲
	Step 3 / 6	



No-minimum custom portfolios

Establish **Advisor-Managed Portfolios** with no minimum gift. Endaoment charges an **25 BPS expense ratio**, while you maintain the flexibility to set your own management fees.



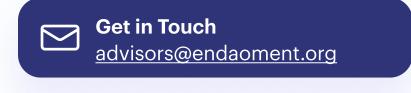
Whether you're establishing an Advisor-Managed Portfolio for a specific client, or are bulk onboarding all DAF clients, we make it easy to get started. **Upgrade your clients' DAF without the hassle.**



Our one-time charitable admin fee starts at 1.5%, and decreases with larger contributions, ensuring cost efficiency for every gift of any size.

Onboard Your Clients Today!

Unlock more AUM and offer modern ease to your clients.



Acta personalized walk-through Comment.org Acta material Comment.org Comment.org Comment.org Comment.org Comment.org Comment.org Comment.org Comment.org Comment.org

Stocks or Securities

Privately Held Assets

^publicly traded stocks and other brokera

Diligence & Compliance

- Read our Investment Policy & Fee Schedule
- Review our <u>Taxability Overview and Flow of Funds</u>
 <u>Diagram</u>
- Explore our <u>Code of Conduct</u> & <u>Risk Framework</u>

Links



