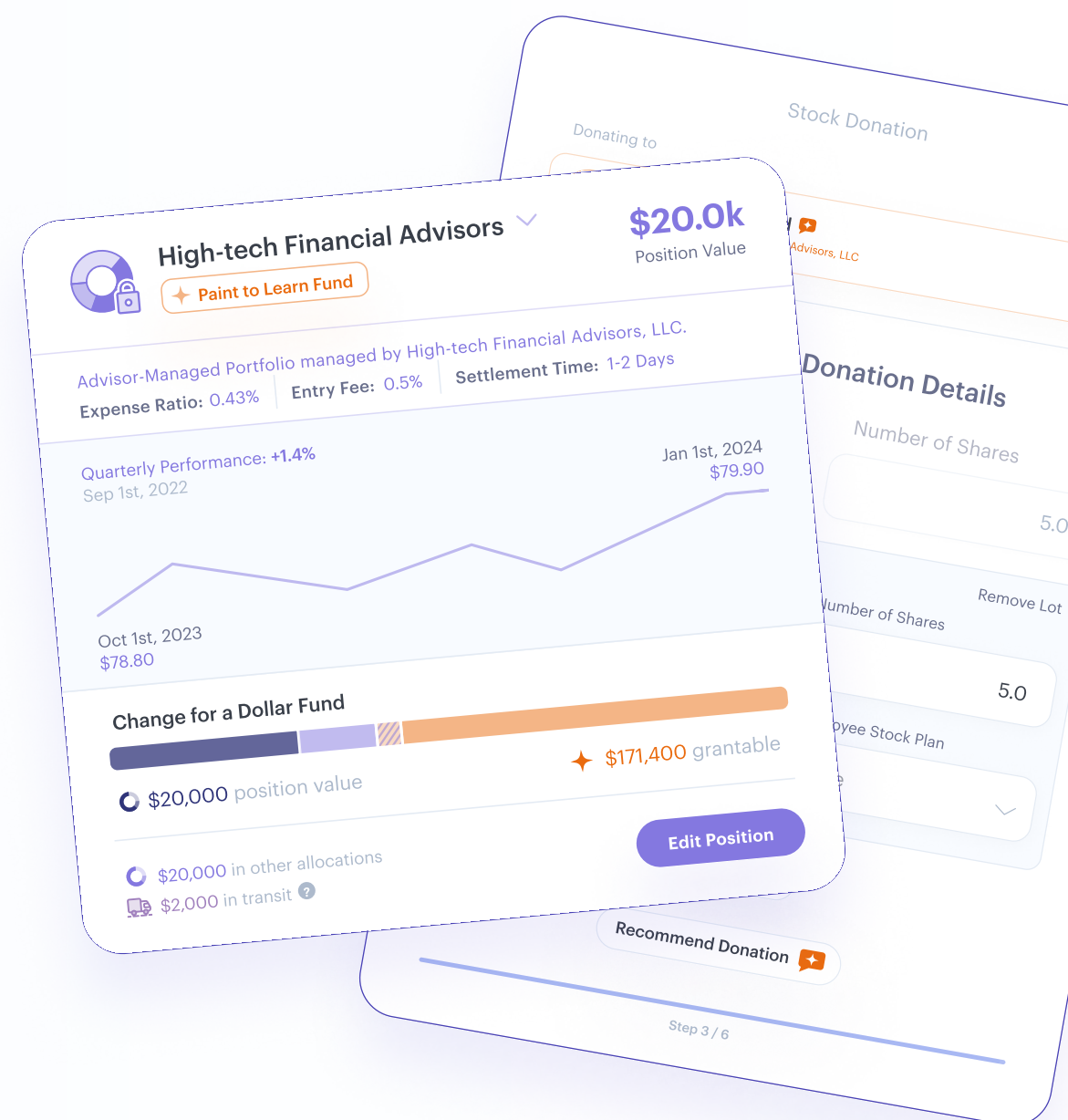# Manage DAF assets in–house

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.

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.

Straightforward setup

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.**
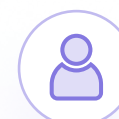
Admin fees that make sense

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.

Get in Touch
advisors@endaoment.org

Request a Demo
Get a personalized walk-through →

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Learn more about Endaoment →

Diligence & Compliance

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

Links

advisors@endaoment.org