

The Power of Partnership

Expanding Philanthropy

Contents

From the CEO	3
Meet AEF	4
Our Expertise	6
The AEF Difference	7
Client Partnerships in Action	9
Milestones that Matter	10
AEF Impact by the Numbers	10
AEF Areas of Impact	11
The Power of Giving	11
Meet Our Leadership	12
Partnership Readiness	13
Let's Get Started	14



From the CEO

Thank you for considering the American Endowment Foundation (AEF) as your partner in philanthropy.

At AEF, we believe that philanthropy has the power to transform lives and communities. We recognize that true philanthropy goes beyond individual transactions; it's about creating a legacy of giving that can be passed down through generations.

With over 30 years of experience in the financial services industry and having sat in your seat as a financial advisor, I understand the unique needs and expectations that come with managing wealth and charitable giving. I know firsthand how important it is to have a trusted partner who understands the broader financial picture while ensuring your philanthropic goals are met with precision and care.

At AEF, philanthropy is personal, and people and relationships are at the heart of everything we do. Every day, we give our best to exceed expectations. We view our collaboration as a partnership, one where we actively engage with you to explore new opportunities for giving and growth. Because expanding philanthropy is more than moments—it means leaving a lasting positive impact together.

As you consider your philanthropic partner, I invite you to join us in this mission to expand philanthropy, and I look forward to the opportunity to work together and build a lasting relationship.

Together, we can create a positive impact!



Ron Ransom
Chief Executive Officer

Meet AEF

Know the who, what, where,
and why behind AEF.

Our sole purpose is
charitable giving through
administering DAFs.



Independent
from other
financial
institutions.



Experienced
with over
30 years of
partnering
with firms.



People-driven
culture.

WHO ARE WE?

We're one of the nation's largest independent donor-advised fund sponsors.

At AEF, we are committed to providing a best-in-class experience. AEF solely focuses on the administration of donor-advised funds to expand philanthropy.

WHAT DO WE DO?

Donor-advised funds (DAFs). And lots of them.

Think of DAFs as a charitable account, and we're the financial institution that takes care of it.

We partner with firms, advisors, and donors to establish and administer AEF donor-advised fund accounts with the goal of increasing the amount granted to our donors' preferred causes and charities.

Meet AEF

Know the who, what, where, and why behind AEF.

WHERE IS AEF'S IMPACT FELT?

Almost anywhere a 501(c)3 account is found.

As a cause-neutral sponsor, we offer your client more options when recommending grantees. There are virtually hundreds of thousands of charities that could reap the benefits of an AEF DAF. Since AEF began in 1993, \$11 Billion has been granted nationally.



Granted over

\$1.2B

in 2023



Nearly

\$5M

per business day



To more than

32K

unique charities

WHAT IS OUR MISSION?

To expand philanthropy and maximize charitable impact.

Founded: 1993 Location: Hudson, OH
Type: 501(c)(3) Public Charity



Our Expertise

Let's talk DAFs. Up to 81%* of advisors find charitable planning good for business.

Donor-Advised Funds (DAFs) can be a core offering for your clients.

Client relationships begin with understanding your client—not just their account details, but also their thoughts and aspirations regarding their assets. Leaving a legacy is always top-of-mind.

A DAF is the most popular and fastest growing charitable giving option in the country. Why?

DAFs integrate well with your client's philanthropic strategies, provide tax benefits and offer more flexibility in how and when their money is distributed.

WHY CHOOSE A DAF?

Donors like them for their:

1. Immediate Tax Benefits
2. Streamlined Giving
3. Increased Impact

Advisors prefer DAFs because they help:

1. Deepen Client Relationships
2. Establish Charitable Footprint
3. Connect with NextGen

DAFs are one of the fastest-growing charitable giving options in the country.

The popularity of DAFs is not a trend, but a shift in the philanthropic landscape. A DAF allows individuals to donate, receive an immediate tax benefit, recommend investments to potentially grow the assets, and recommend grants to eligible charities from the fund—all on their timeline. This flexibility empowers donors to make decisions when it works best for them.

DAFs can accept a wide range of contributions—from cash and publicly traded securities to more complex assets like illiquid or alternative investments. Donors like the flexibility of the DAF, advisors like the additional philanthropic offering that deepens client relationships.

*U.S. Trust and the Indiana University Lilly Family School of Philanthropy



The AEF Difference

AEF makes DAFs a priority.

DAFs are not a product offering, they're our focus—making us one of the nation's largest independent sponsors.

We are here to support firms and advisors in delivering your business goals—and creating a charitable offering that becomes invaluable to your clients who want to expand their philanthropic efforts.

STREAMLINED SUPPORT AND ADMINISTRATION

We work with you to establish and administer accounts and process grants to your donors' favorite charities. Plus, we cover administrative tasks like processing gifts, managing paperwork, and vetting recommended grant recipients.

WIDE RANGE OF CHARITABLE CHOICE

Being cause neutral allows an unbiased approach to charitable giving. Your clients have more options when choosing from 501(c)3 charities.

FLEXIBLE FUNDING

Initial funding requirements are among the lowest in the industry, while also allowing you to invest and manage the assets on your firm's platform.

ENHANCED ADVISOR PLATFORM

Our platform makes opening funds easier and provides you and your team with more visibility to fund activity. Plus, stay informed on industry trends and philanthropic thought leadership through a variety of industry resources.

Remember, AEF is the sole legal owner of all investment accounts and assets in a DAF. This requires our express written authorization prior to moving any funds within the DAF.



The AEF Difference

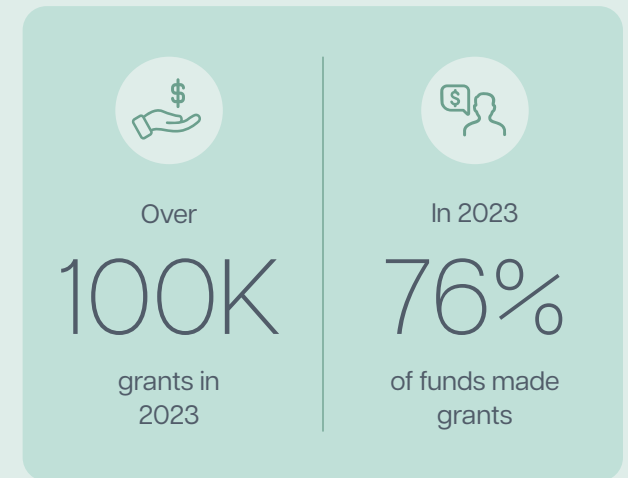
AEF makes DAFs a priority.

AEF forges strong partnerships with financial advisors and firms.

These collaborations help us build trust with both current and future donors and those close to their philanthropic journeys.

Recognizing the personal nature of charitable giving, we engage with investment professionals and wealth advisors to enhance the power of philanthropy.

Our efforts have led to over 100,000 grants in 2023. Notably, the proportion of our DAFs granting to charities has steadily increased, with 76% of funds making grants in 2023.



Remember, AEF is the sole legal owner of all investment accounts and assets in a DAF. This requires our express written authorization prior to moving any funds within the DAF.



Client Partnerships in Action

AEF fosters strategic partnerships across firms, advisors, donors, and vendors.

We create partnerships to drive long-term philanthropic impact and empower stakeholders with the resources and knowledge to champion charitable causes.



FIRM

Establish long-term partnerships.



DONORS

Facilitate championing of charitable intent.



ADVISORS

Empower with knowledge to establish relationships.

Milestones that Matter



AEF Impact by the Numbers

AS OF DEC 31, 2023

MAKING A POSITIVE IMPACT

Our ability to provide a best-in-class client experience within the financial services industry extends to:



Over

14K

donors



Nearly

6K

financial advisors



2.5K

partnering firms

Through DAFs, not just as financial tools, but as powerful catalysts for change, donors can contribute strategically and align their vision with significant support through charitable giving. Together, we can shape a brighter future through the transformative and lasting power of philanthropy.

Average DAF

\$483,503

Grants per Business Day in 2023

\$4.9M

States with Charities Granted in 2023

50

Average Grant

\$12,158

Median Grant

\$1,000

Number of Grants in 2023

100,786

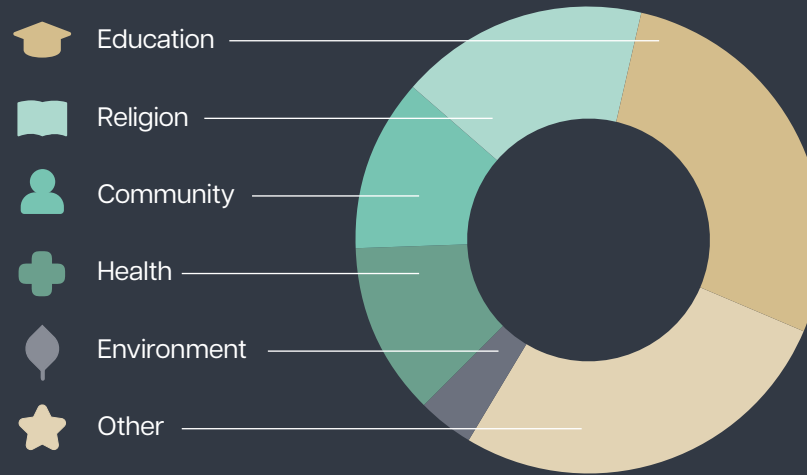
Distinct Charities Supported in 2023

Nearly
32,000



AEF Areas of Impact

The top 5 categories in our areas of impact represent 62% of charitable giving over the last five years (as of Dec 31, 2023).



The Power of Giving

As an independent sponsor of donor-advised funds, AEF provides a neutral platform that emphasizes gifting, investment flexibility, grant-making, and administrative expertise, all tailored to personalized charitable management.

Giving and Granting with a DAF

GIVING

-  Flexible Strategy
-  Full Discretion
-  Public and Private Assets

GRANTING

-  Grant Recommendation
-  Vetting
-  Approval and Distribution

Meet Our Leadership

At AEF, philanthropy is personal, and people and relationships are at the heart of everything we do.

OUR COMMITMENT

Working together as active students of our organization and the industry, our team makes this commitment: to deliver a best-in-class client experience that fosters strong relationships and promotes more opportunity for charitable giving.

OUR EXECUTIVE TEAM



Chief Executive Officer
Ron Ransom



Chief Financial Officer
Steve Jones



General Counsel
Michele Hoza, J.D.



Chief Business Strategy Officer
Noel Juguilon



Chief Technology
& Innovation Officer
Mark Manning



Chief People &
Culture Officer
Paula Hogan



Chief Business
Development Officer
Karen Heath-Wade



Chief Marketing &
Communications Officer
Kelly McGrath

Partnership Readiness

Let's make an impact together.

NEXT STEPS

To support you in your philanthropic journey, AEF has established clear protocols to guide next steps, ensuring a sustainable, long-term partnership. Our dedicated team collaborates closely to provide a seamless transition, delivering a best-in-class client experience from start to finish.



01
INITIATION



02
PLANNING



03
EXECUTION



04
MONITORING



05
CLOSURE

Let's Get Started