



Donor-Advised Fund Transfer Instructions

We welcome your DAF giving through Greater Tacoma Community Foundation

Thank you for your interest in bringing your Donor-Advised Fund (DAF) to Greater Tacoma Community Foundation (GTCF).

Transferring your DAF is a straightforward process. GTCF's Philanthropic Advisors will guide you every step of the way.

Step 1: Establish Your GTCF Donor-Advised Fund

Before initiating a transfer, you must first open a DAF at GTCF. You will need:

- [Completed GTCF Donor-Advised Fund Agreement](#)
- Fund name (e.g., "[Family Name] Family Fund" or another name of your choosing)
- Names and contact information for all Fund Advisors and any Successor Advisors
- Confirm your investment allocation based on your elected strategy

If you already have a DAF at GTCF and want to transfer a DAF from another institution to that DAF, confirm your fund name and account details.

Contact our Philanthropic Services team to get started: (253) 245-4174 or FAservices@gtcf.org

Step 2: Submit a Grant Recommendation to Your Current DAF Sponsor

Log in to your current DAF sponsor's portal and recommend a grant to GTCF.

Provide your current sponsor with the following information:

Payee / Recipient: Greater Tacoma Community Foundation

EIN / Tax ID: 91-1007459

Mailing Address: 950 Pacific Avenue, Suite 1100, Tacoma, WA 98402

Grant Memo / Purpose: For the benefit of: [Your Fund Name] (Donor-Advised Fund)

Grant Type: DAF-to-DAF Transfer Grant

***Note:** You may transfer the full balance in one grant or in multiple installments. Please notify GTCF when you submit the recommendation so we can watch for incoming funds.*

Step 3: GTCF Receives and Credits Your Transfer

Once GTCF receives the grant from your current sponsor, our team will:

- Deposit the funds into your designated GTCF Donor-Advised Fund
- Send a written acknowledgment confirming receipt
- Set up your online fund portal access (if not already established)

Typical processing time from receipt of funds to account credit is 3–5 business days.

Note: *This transfer is not tax-deductible — it is a movement of previously donated charitable assets. No new tax receipt will be issued.*

Step 4: Confirm and Close Your Prior DAF (If Desired)

Once the transfer is complete and your GTCF DAF is active, you may choose to close your account at your previous sponsor.

Before closing your DAF at another institution:

- Confirm with GTCF that all transferred funds have been received and credited
- Download your complete grant history, contribution records, and acknowledgment letters from your previous sponsor
- Notify your previous sponsor in writing that you wish to close the account
- Update any recurring giving instructions or auto-grants that may reference your old account

Note: *GTCF cannot initiate or guarantee the closure of your account at another organization. Please work directly with your previous DAF sponsor.*

Frequently Asked Questions

How long does the transfer process take?

The timeline varies by current sponsor. Most grant recommendations are processed within 5–10 business days. The entire process — from submitting the grant recommendation to funds being credited at GTCF — typically takes 2–4 weeks.

Can I transfer non-cash assets (stocks, securities)?

DAF-to-DAF transfers are generally completed as cash grants. If you hold appreciated securities within your current DAF, your sponsor will typically liquidate them before issuing the grant. Speak with your current sponsor and your financial advisor before initiating the transfer.

Is this transfer taxable?

No. Transfers between donor- advised funds are tax-neutral events. No new charitable deduction is created, and no taxable event occurs. For questions specific to your tax situation, please consult your tax advisor.

Can I continue making grant recommendations during the transfer?

Yes, you may continue recommending grants from your current DAF until it is closed. We recommend completing any pending or in-progress grants before initiating the transfer to simplify the process.

What if my current sponsor requires a minimum balance?

Some sponsors require a minimum balance to keep an account open. If the full balance cannot be transferred in one grant, transfer the bulk of the funds first, then work with your current sponsor to transfer the remaining balance when permitted.

What investment options are available for my fund at GTCF?

GTCF offers a range of investment pool options to match your time horizon and philanthropic goals. You can learn more from our [Investment Overview Brochure](#). Your Philanthropy Advisor will walk you through available options when you establish your fund.

Questions?

Contact GTCF Philanthropic Services: (253) 245-4174

FAservices@gtaf.org

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