



How to Transfer your Existing Donor-Advised Fund to a National Charitable Endowment Donor-Advised Fund

Once completing the steps for opening a new Donor-Advised Fund at National Charitable Endowment, you will need to complete the following steps.

1. Complete a grant request form from you existing Donor-Advised Fund, naming the grantee as National Charitable Endowment FBO the Donor-Advised Fund's name.
2. Transfer the entire amount (fund balance). Ensuring the entire amount of your fund value will be transferred into your new Donor-Advised Fund.

Please feel free to contact us with any other questions that you may have and our staff will help make this process as simple and easy as possible.