

THE OUTCOMES CONFERENCE 2024  
APRIL 9, 2024 | 4:00 PM | CITY TERRACE 4

# MISSION ADVANCEMENT DONOR-ADVISED FUNDS

There are nearly **2 million** donor-advised funds (DAFs), with a combined total of almost **\$230 billion** earmarked for charity. Within the context of stewardship, we'll take a comprehensive look at this giving tool so you can leverage its benefits for your nonprofit's mission.

## OVERVIEW & OUTCOMES:

- 1. DAFs 101**— We'll explain what a donor-advised fund is and how it works. *Therefore*, you'll understand how a DAF helps donors Give, Grow, & Grant.



- 2. DAF GROWTH**— We'll look at DAF growth trends and consider why the DAF is an increasingly popular charitable giving solution, given donor behavior and the philanthropic landscape. *Therefore*, you'll understand the history and projected future of DAF giving.
- 3. DAF BENEFITS**— We'll cover the tax benefits that a DAF provides to both donors and nonprofits. *Therefore*, you'll understand how donors can use a DAF with appreciated assets, a financial windfall, and charitable bundling.
- 4. DAF REGULATIONS**— We'll tackle the most frequently asked questions regarding DAF grantmaking. *Therefore*, you'll understand if DAF grants can be used for scholarships, pledges, and bifurcated gifts.
- 5. DAF DONOR ENGAGEMENT**— We'll discuss best practices for encouraging and responding to gifts from DAF donors. *Therefore*, you'll understand how to record and credit DAF gifts and how to cultivate future DAF gifts.

### ADDITIONAL RESOURCES:

*Check out these blog posts for more information*

[Give More with Zero](#)

[Is a DAF Right for Me](#)

[Nonprofit Fundraising and DAFs](#)

[7 Most Common DAF Myths](#)

[Private Foundations and DAFs](#)

## ABOUT HIGHGROUND ADVISORS:

For nearly a century, HighGround Advisors has advanced the life-transforming work of our nonprofit client partners, and those who support them, by thoughtfully stewarding the assets they entrust to us. Our areas of expertise include endowment and investment management, real estate and minerals management, and charitable gift planning. Today, with over \$2.8 billion in assets under management, HighGround serves over 525 churches, ministries, and nonprofits, and in the last decade, HighGround distributed over \$1 billion to client partners and beneficiaries. With our flexible investment platform, we can design short-term and long-term investment solutions to fit the unique goals and needs of our client partners, while our expert legal team helps donors maximize their charitable impact with giving tools like donor-advised funds, gift annuities, trusts and endowments. The services we provide at HighGround Advisors enable our clients, who are actively making a difference today, to make an even greater difference tomorrow. Partner with HighGround to Protect, Strengthen and Grow your mission. For more information and industry insights, visit our [blog](#) or connect with us on [LinkedIn](#).

## ABOUT THE PRESENTERS:



### JOE HANCOCK

Vice President & General Counsel

Joe Hancock, HighGround's Vice President and General Counsel, has more than 25 years of experience as a legal expert and esteemed speaker in areas of nonprofit, trust, estate and charitable tax law. At HighGround, Joe counsels nonprofit client partners regarding charitable law, gift requirements, and issues affecting nonprofit status. He serves HighGround's individual clients by guiding them through charitable gift giving and tax and estate planning. He also monitors state and federal legislation that may impact nonprofit organizations and educates clients regarding applicable regulations.

Before rejoining HighGround in 2002 (Joe previously worked for HighGround from 1996-1999), Joe worked for the Children's Medical Center of Dallas (now Children's Health) where he counseled major donors in matters of charitable tax and estate planning, prepared gift planning proposals, drafted promotional materials and hospital policies, and administered estates through probate which benefited the hospital.



### KATIE WARREN

Communications & Donor-Advised Fund Program Manager

Having joined HighGround in 2020, Katie oversees the growth, operation, and donor stewardship of HighGround's Donor-Advised Fund Program. In this role, she also speaks at industry conferences and donor gatherings to educate and champion the benefits of the charitable giving tool. Additionally, Katie is responsible for developing marketing and communication strategies that increase brand awareness and promote HighGround's client solutions.

Katie has nearly a decade of experience in marketing strategy, copywriting, and relationship management within the financial services industry. She previously worked at PKF Texas, a CPA firm, where her responsibilities also included recruiting and employee engagement. Katie graduated with honors from Texas A&M University with a BBA in marketing.