



DAF Perspectives for Advisors

Expertise and tools to help advisors deepen the philanthropic conversation

Help your clients plan their giving in uncertain times

By John Canady, Chief Executive Officer

Throughout the global pandemic, donors all over the world have demonstrated continued commitment to supporting the most vulnerable people in our societies. As we've [previously discussed](#), charities continue to need ongoing, long-term support from their donors. As advisors, now is a particularly good time to consider encouraging your clients to review their giving and to help them meet their charitable goals.

Here are a few steps your clients can take to shore up their giving:

- **Carefully consider their grantmaking needs.** Your clients may find it useful to make a list of the organisations to which they have already given. Do they plan to renew their support in the coming months? Next, there may be new causes and charities that have made an impact on them. Would they like to add any to their list of grantees? By going through this exercise together, you can help your clients determine how much they plan to give in the near to medium term.
- **Look at their existing DAF funds, if any.** Given the amount of giving your clients may have already done this year, do they have the funds currently available in their DAF to fulfil an ongoing commitment to existing charities and to support new ones? Now might be a good time to contribute assets that have increased significantly in value, such as appreciated shares, for future grantmaking.
- **Help your clients build a giving legacy.** Some of your clients may have moved from chequebook giving to more strategic philanthropy. Others may now want to involve the next generation in their family's giving. DAF clients may want to consider building a charitable endowment—just as they would with a charitable trust or foundation—to meet their future grantmaking needs and ensure that their giving can continue on beyond their lifetime.

By contributing to their DAFs today, your clients won't have to worry that a downturn could put their giving—and the causes important to them—at risk.

To discuss how NPT UK can help you and your clients with their long term giving, contact us at enquiries@nptuk.org.

John Canady, CEO of National Philanthropic Trust UK, has 25 years of experience working across the business, nonprofit and government sectors. He specializes in creating and managing philanthropic funds for donors and family offices around the world who wish to base their philanthropy from the UK.

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