



OVERVIEW AND Q&A

DAF Mobilization Project



Put Your DAF to Work – With No Fees for Three Years



At RSF, we believe donor-advised fund capital shouldn't sit idle. That's why we're offering a unique opportunity to eliminate fees, earn interest, and maximize your impact through our **DAF Mobilization Project**.

How It Works



When you open a DAF at RSF and allocate a portion of your funds to our Social Investment Fund (SIF) — a 40-year-strong, evergreen impact fund — you'll:

- ✦ Pay zero DAF management fees for three years on invested capital.
- ✦ Earn interest while your capital supports mission-driven enterprises tackling issues like climate, sustainable food, and community resilience.
- ✦ Retain flexibility — the remaining balance in your DAF is always available for grants.
- ✦ Double your impact — [investing your capital before you grant it out](#).

Right now, billions of dollars in DAFs sit stagnant — or worse, are invested in industries that run counter to donors' missions. With RSF, your capital works harder for you and the world.



Want to learn more about the DAF Mobilization Project, opening a DAF or transferring your DAF to RSF, or how the Social Investment Fund drives impact?

[Get in touch with Kathleen Paylor](#), RSF's Vice President of Impact Investing and Philanthropy, or [visit RSF's website](#).



Frequently Asked Questions



Q: Can I move funds from my existing DAF to a DAF at RSF?

A: Yes, you may use funds from an existing DAF at another custodian to open a DAF account at RSF. Contact your custodian's client service team to learn how to transfer funds from your current DAF to RSF.

Q: Can I grant out the funds I've invested?

A: While in the Social Investment Fund, funds may not be granted out until the maturity date of the note they are invested in. For this reason, we recommend investing in term lengths that fit your individual giving plan.

Q: What kind of terms and returns are the SIF notes?

A: SIF notes are available for a 90-day term at 1% annualized interest, 1-year at 2%, or 3 years at 3.5%.

Q: What does the Social Investment Fund invest in?

A: The Social Investment Fund invests across four focus areas: Climate & Energy, Food & Agriculture, Education, and Community Impact. For a complete list of borrowers, [visit this page](#).

Q: What happens at the end of three years?

A: After three years, funds invested in the Social Investment Fund will be assessed at RSF's standard rate for invested funds. Consult our DAF Program Guide to see what rates will apply to your individual account size.

Q: Can I add more funds to my DAF before the end of the offering period and still get 0% fees on DAF funds invested in SIF?

A: Yes! If you decide to contribute more than your initial DAF donation and invest those funds into the SIF before December 1, 2025, those funds will be fee-free for three years.