

»» COMPARISON TO OTHER DAF PROVIDERS

	Amalgamated Foundation (ACF) Advance Change Funds (DAFs)	Most Financial Institutions Donor Advised Funds (DAFs)
PRIMARY ROLE <ul style="list-style-type: none"> Fund management Investment management Grants administration Public charity of record for grants 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓
CONTRIBUTIONS <ul style="list-style-type: none"> Cash Publicly traded securities 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓
INVESTMENT OPTIONS <ul style="list-style-type: none"> Mutual funds of varied risk profiles Fossil fuel free & ESG options Amalgamated Bank money market fund supporting community development investment 	<ul style="list-style-type: none"> ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ <p>May offer socially screened fund option</p>
RESEARCH <ul style="list-style-type: none"> Pre-vetted organizations in on-line open source grantee database Partnership with JustFund for on-line research, proposal management Consultation on potential regulatory, legal, and structural issues (charitable activity, lobbying, sponsored projects) 	<ul style="list-style-type: none"> ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✗ ✗ ✗
GRANT RECOMMENDATIONS <ul style="list-style-type: none"> On-line grant recommendations Direct link to Guidestar 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓
DUE DILIGENCE <ul style="list-style-type: none"> Confirm grant details: organization, purpose, amount, available funds Confirm charitable status OFAC (terrorist list) check Hate group screening Assess and manage complex risks 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✗ ✗
GRANT PROCESSING	5-7 days	3-4 week
FUND MANAGEMENT <ul style="list-style-type: none"> On-line review of fund activity 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓
COLLECTIVE IMPACT <ul style="list-style-type: none"> Rapid Response Funds in the event of natural or civic crisis Opportunity to learn about and support Combined Impact Funds supporting social change 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> ✗ ✗
CONTRACTS <ul style="list-style-type: none"> Ability to pay contracts to vendors and consultants for qualified charitable activity 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✗