






How to Open Your **UBS** Renaissance Charitable Donor-Advised Fund

-  1. Open Investment Account
-  2. Submit the DAF Application
-  3. Send Proof of Funding
-  4. Login and Create Your Password
-  5. Account Ready for Granting



Before you begin:

- For all investment account documentation, Renaissance Charitable Foundation (RCF), not the donor, must be listed as the account owner.
- The Advisor may need to be licensed in the state of Indiana to open the new account. Check with your firm's compliance department for their requirements.

1. Open the Investment Account

Set up the new UBS investment account using the Renaissance Charitable client id 8400011600.

2. Submit the DAF Application

Complete the **DAF application** and obtain all necessary signatures from the Primary Advisor and Donor(s).

Send to ubs@reninc.com with **Subject Line: [Account Name] New DAF Application** (generally set up within 2 business days).

3. Send Proof of Funding

Please send the below information to ubs@reninc.com with **Subject Line: Proof of Funding [Account Name]**.

Body of the Email:

Donor Name

DAF Account Code (as detailed in your credential email)

Screenshot of the investment account or statement that includes:

Investment Account number

Asset Type

Number of shares / cash amount

Asset Name

Date of initial funding

Ren will review and post the contribution to the account.

4. Login and Create Your Password

New Advisors and Your Client

You and your client will receive a welcome email from do_not_reply@reninc.com containing a link to complete your credentials. Use it to log in and set your permanent credentials within 48 hours. If you or your client missed this window, go to ubs.donorfirstx.com, select **Log In** and then click **Create or Reset Password**.

Existing Advisor

You will find the new account under Account Listing in the Donor Portal.

5. Account Ready for Granting

Once Ren does a final review, the account will be placed in grant ready status.

Please Note: Once your grant has been submitted and passed vetting, you will need to make funds available for your centralized grant team.