

Charitable Organizations

A charitable organization can utilize a Donor-Advised Fund for professional investment management expertise, while designating certain funds for different projects. Donations may be contributed from individual donors to support a particular project and, when funds are needed, the Donor-Advised Fund will distribute funds back to the charitable organization.

Benefits:

- Cost effective and easy to set up with a simple application
- Flexibility with naming the account (e.g., The Save the Wildlife Project Fund)
- We handle the record keeping and administrative work and send acknowledgement letters to Donors for their gift
- Grants can easily be made with online gifting
- Separate certain donations for a project within a charitable organization
- Professional investment management from Eaton Vance, whose history dates to 1924

To learn more, please contact Charitable Marketing at 800-836-2414.

I Want to View...

- [Donor-Advised Funds Forms Booklet](#)
- [Entity Form – Used with Forms Booklet when contributing as Corporations, Nonprofits, and other Entities.](#)
- [Donor-Advised Fund Performance Report](#)

the decision to contribute. The tax consequences of contributing to a Legacy Income Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Distributions to income beneficiaries are not guaranteed by any party, and are subject to investment risk. In considering potential changes in annual distribution rates of the Legacy Income Trusts, the Trustee will assess their long-term earnings potential and seek to balance the interests of current and future income beneficiaries and the charitable remainder interests. Neither the Gift Trust nor the Legacy Income Trusts has been registered under federal securities laws, pursuant to available exemptions. Neither of the Gift Trust nor the Legacy Income Trusts is guaranteed or insured by the United States or any of its agencies or instrumentalities.

NOT FDIC INSURED | OFFER NO BANK GUARANTEE | MAY LOSE VALUE | NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY | NOT A DEPOSIT

Eaton Vance Distributors, Inc. (Placement Agent) is a paid solicitor of the Gift Trust and the Legacy Income Trusts, receiving compensation as described in the applicable information statement or gifting booklet.

This site and the materials herein are directed only to certain types of contributors and to persons in the United States where the Gift Trust and Legacy Income Trusts are authorized for distribution.

The foregoing discussion also applies to pooled income funds established by the Gift Trust prior to the Legacy Income Trusts (Heritage Pooled Income Funds), although the Heritage Pooled Income Funds are no longer accepting new contributions.

Prior to March 1, 2021, Eaton Vance, the Trustee and the Placement Agent were wholly-owned subsidiaries of Eaton Vance Corp. (EVC). On March 1, 2021, Morgan Stanley acquired EVC and, as a result, Eaton Vance, the Trustee and the Placement Agent became indirect, wholly-owned subsidiaries of Morgan Stanley. Morgan Stanley (NYSE: "MS"), whose principal offices are at 1585 Broadway Avenue, New York, New York 10036, is a preeminent global financial services firm engaged in securities trading and brokerage activities, as well as providing investment banking, research and analysis, financing and financial advisory services.

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