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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.

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[Donor-Advised Funds Application](#)

[Entity Form - Used with Application when contributing as Corporations, Nonprofits, and other Entities.](#)

[Donor-Advised Fund Performance Report](#)

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.

Have concentrated stock, mature capital gains, or appreciated assets?

Get in touch to learn more about how the U.S. Charitable Gift Trust fits into your overall wealth planning strategy.


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Trustee and the Board of Directors. Donors to the Gift Trust and the Legacy Income Trusts should be motivated by charitable intent. As charitable giving vehicles, the Gift Trust and the Legacy Income Trusts should not be treated as, and are not designed to compete with, investments made for private gain. An intention to benefit the Gift Trust and one or more qualified charitable organizations eligible for support by the Gift Trust should be a significant part of the decision to contribute. The tax consequences of contributing to the Gift Trust or a Legacy Income Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Distributions to Legacy Income Trust income beneficiaries are not guaranteed by any party, and are subject to investment risk. In considering potential changes in the 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

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The foregoing discussion applies to the currently offered Legacy Income Trusts and the predecessor Legacy Income Trusts established by the Gift Trust in 2019, which ceased accepting new contributions on January 1, 2022. This discussion also applies to the pooled income funds established by the Gift Trust prior to the Legacy Income Trusts, which are also no longer accepting new contributions.

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