

Corporate Giving

A corporate giving account with a Donor-Advised Fund is a simplified charitable giving account that can benefit businesses with favorable tax benefits, as well as support local businesses and communities.

Benefits:

- Cost effective and easy to set up with a simple application
- Boost morale and leadership for your organization
- Flexibility with naming the account (e.g., The XYZ Corporation Charitable Fund)
- Support charities any time with online gifting
- Corporate deductions may be available
- Tax reporting is provided; the Administrator does the record keeping and administrative work
- No annual gift requirement at the account level
- Professional money management by Eaton Vance, whose history dates to 1924

Minimum Contributions:

Initial contribution of \$10,000 is required, after which minimum donations of \$1,000 may be made.

Minimum Grant:

A minimum grant of \$100 or more may be gifted to qualified U.S. charities. There are no restrictions on the maximum number of grants that can be recommended in any given time period nor any annual grant requirement at the individual account level. See Gifting Booklet for all rules regarding grants.

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 Legacy Income Trusts are subject to the requirements of state and federal law, the terms and conditions of the applicable Declaration of Trust, the current information statement and/or gifting booklet and the completed forms submitted by each Donor. The Board of Directors of the Gift Trust (Board of Directors) reserves the right to modify the program of the Gift Trust and the Legacy Income Trusts at any time, subject to the provisions of the applicable Declaration of Trust and state and federal law. Any contribution to the Gift Trust or a Legacy Income Trust, once accepted by Eaton Vance Trust Company (Trustee), represents an irrevocable commitment. Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Gift Trust, the Trustee and the Board of Directors. Donors to the Legacy Income Trusts should be motivated by charitable intent. As charitable giving vehicles, 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 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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