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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.

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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
- 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 Contribution

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](tel:800-836-2414).

To report a website vulnerability, please go to [Responsible Disclosure](#).

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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.

Click [here](#) for important information about state notifications.

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