

Donor-Advised Funds







Consolidate your giving with a tax-deductible contribution to a Donor-Advised Fund. Then, on your timetable, select qualiÙed charitable organizations for the receipt of grants (subject to the review and approval of the Gift Trust). You can build a legacy of charitable giving by passing on the role of Donor Advisor to your heirs or other individuals, or requesting that a charitable endowment account be established and gifted out over time upon your passing.

BeneÙts



You are eligible for an immediate federal income tax deduction



Reduce paperwork:

Consolidated report shows all receipts in one place





Avoid capital gains tax

on gifts of appreciated securities



Potentially grow your donations

tax-free while you decide which charitable organizations to support and when to make grants



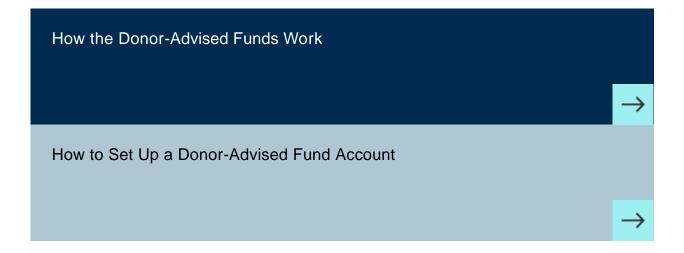
Enjoy online access to manage all aspects of your charitable giving

Donor-Advised Fund Performance Reports

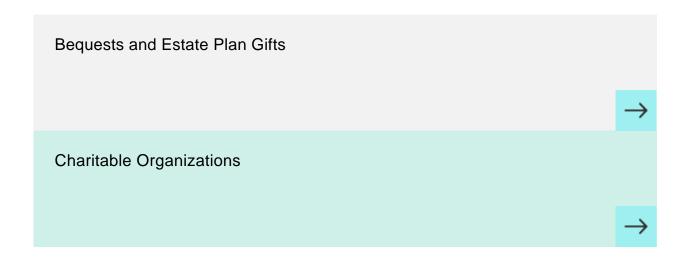
The Traditional I, II, and III Donor-Advised Funds are closed to new investors. Donations to Donor Accounts created prior to November 22, 2003 are invested in the Traditional I Donor-Advised Funds. Donations to Donor Accounts created on or after November 22, 2003 to August 14, 2009 are invested in the Traditional II Donor-Advised Funds. Donations to Donor Accounts created on or after August 15, 2009 to November 14, 2010 are invested in the Traditional III Donor-Advised Funds. Donations to Donor Accounts created after November 15, 2010 are invested in the Traditional IV Donor-Advised Funds.



Understanding Donor-Advised Funds



Ways to Participate





Resources

Literature and Forms	
Offering Brochure	
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Download	
Gifting Booklet	
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Application	
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Donor-Advised Funds vs. Private Foundations	
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☐ BeneÙciary Designation Sample Language	
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Additional Contribution Form	
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☐ Entity Form – For donors that are corporations, partnerships or other entities.	
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Download Selected	
Share Selected	
Download All	

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

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

U.S. Charitable Gift Trust®

Contact Us

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U.S. Legacy Income Trusts® (Legacy Income Trusts) are pooled income funds described in Section 642(c)(5) of the Internal Revenue Code established by U.S. Charitable Gift Trust® (Gift Trust), a tax-exempt public charity offering donor-advised funds. All activities of the Gift Trust and the Legacy Income Trusts and the participation of Donors and income beneÙciaries in 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 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 beneUt the Gift Trust and one or more qualiÙed charitable organizations eligible for support by the Gift Trust should be a signiÙcant 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 beneÙciaries 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 beneUciaries 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.

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.

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persons in the United States where the Gift Trust and Legacy Income Trusts are authorized for distribution.

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.

Not FDIC Insured—Offer No Bank Guarantee—May Lose Value

Not Insured By Any Federal Government Agency—Not A Deposit