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How to Set Up a Donor-Advised Fund Account

To open an account, please complete the Donor-Advised Funds Forms Booklet and follow instructions for Gifting to the U.S. Charitable Gift Trust® for different asset type transfers.

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](#)

1

Complete a Donor-Advised Funds **Donor Information Form**. In addition to the Donor Information Form, please use **Entity Form** when contributing as Corporations, Nonprofits, and other Entities.

2

Donor needs to initiate the transfer of its assets to the **U.S. Charitable Gift Trust**. Instructions are provided in the Forms Booklet. If it's a securities transfer, please follow-up with the firm that holds the asset to see if shares have been sent to the U.S. Charitable Gift Trust.

3

When you contribute securities, it generally takes a **few days** for the shares to sell and settle (normally T+3 days). The net proceeds received from the sale of securities or your cash contribution will be invested into the investment fund chosen by you, and an acknowledgement of your gift will be made available to you.

Please review the [Gifting Booklet](#) for important policies and procedures.

You should consult with your tax or financial advisor to determine how the Donor-Advised Funds can best suit your situation.


For questions regarding the forms, please call the Administrator, Renaissance Philanthropic Solutions Group at 800-664-6901.

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

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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 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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