

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.


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.

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](#)

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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. None of the Gift Trust, the Legacy Income Trusts or the Heritage Pooled Income Funds has been registered under federal securities laws, pursuant to available exemptions. None of the Gift Trust, the Legacy Income Trusts or the Heritage Pooled Income Funds is guaranteed or insured by the United States or any of its agencies or instrumentalities. Contributions are not insured by the Federal Deposit Insurance Corporation and are not deposits or other obligations of, or guaranteed by, any depository institution.

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