

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](#)

right to modify the program of the Gift Trust, the Legacy Income Trusts and Heritage Pooled Income Funds at any time, subject to the provisions of the applicable Declaration of Trust and state and federal law. Any contribution to the Gift Trust, a Legacy Income Trust or Heritage Pooled Income Fund, 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 Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Gift Trust, the Trustee and the Board of Directors.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 and the Heritage Pooled Income Funds should be motivated by charitable intent. As charitable giving vehicles, the Legacy Income Trusts and Heritage Pooled Income Funds 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 or a Heritage Pooled Income Fund 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. 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.

Eaton Vance Distributors, Inc. is a paid solicitor of the Gift Trust, the Legacy Income Trusts and the Heritage Pooled Income Funds, 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, Legacy Income Trusts and Heritage Pooled Income Funds are authorized for distribution.

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