

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.

- **Step 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.

- **Step 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.

- **Step 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 Administration LLC at 800-664-6901.

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](#)

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 Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Gift Trust, the Trustee and the Board of Directors.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.

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