

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

- **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
- Gifting with Non-Cash Assets

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The U.S. Charitable Gift Trust® (the "Trust") is a tax-exempt public charity that receives donations from individuals, corporations and others, and that makes grants to numerous charitable organizations throughout the United States, including charities selected by the Trust and those recommended to the Trust by donors and others authorized by the donor to make grant recommendations. The Trust is located at Two International Place, Boston, MA 02110. Charitable contributions accepted by the Trust are irrevocable. Donors have no right to income or principal other than as provided by Pooled Income Fund accounts, and account values will fluctuate. The Trust and its Pooled Income Funds are not guaranteed or insured by any governmental body. The Trust is not available in Puerto Rico. A financial statement of the Trust, for which the solicitation is being made, and a copy of the Declaration of Trust will be provided upon request. Prospective donors are encouraged to consult their tax advisors regarding their specific tax status before contributing.

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