

RESPONSIBLE INVESTING

# Now available in Donor Advised Fund accounts

The U.S. Charitable Gift Trust® now offers Responsible Investing funds. Learn how these funds managed by Calvert Research and Management may help you align your Donor Advised Fund account with your values.

[Download PDF](#)

Setup a Donor Advised Fund Account Online

[Get started](#)

## Letter from the President



Welcome,

The U.S. Charitable Gift Trust® (the "Trust") helps you realize your charitable goals, while enabling you to receive the maximum tax benefit from a gift.

Within our site, you can gather important information that can form the foundation of your discussions with your financial advisor.

As you will learn, the Trust is a public charity that makes charitable giving efficient and effective. You can give to multiple charities with ease. Contributions are professionally managed and have the potential to grow in value, tax free. The potential tax benefits are immediate, but you may take your time in making grants to your favorite causes and organizations.

Accounts are established individually or jointly with a spouse or children, all of whom may make grants from the Trust. You may also appoint a financial advisor to assist you in the setup, investment allocation and maintenance associated with the account. For many, charitable giving is becoming a family tradition, with none of the expenses or limitations of a private foundation.

The Trust also sponsors Pooled Income Funds. These Funds are designed to provide eligibility for a tax deduction and monthly income to you, or designated beneficiaries, and to pay the principal of your account on to the charity(ies) of your choice.

The Trust is overseen by its Board of Directors, which meets quarterly to oversee the Trust's operations, as well as to review and approve all donor grants. The Trust helped a number of people to restructure their program of giving with greater flexibility and tax efficiency. We look forward to working with you to better assist your philanthropic efforts.

Sincerely,

Jeffrey P. Beale  
President  
The U.S. Charitable Gift Trust®

## How To Set Up A...



**Donor Advised Fund Account**  
Complete the Donor Advised Fund Forms Booklet. Follow instructions for different asset type transfers.  
[Learn More](#)



**Pooled Income Fund Account**  
Complete the Pooled Income Fund Forms Booklet. Follow instructions for different asset type transfers.  
[Learn More](#)

## I Want to View...


- Donor Advised Fund - Quarterly Performance Report
- Pooled Income Fund - Quarterly Performance Report (current and history of yields)

## News & Information

- Automatic Investing into Your Donor Advised Fund or Pooled Income Fund
- Getting the Most Out of Your Non Cash Assets

## Contact Us

Please call Eaton Vance Charitable Marketing at **800-836-2414** to discuss your charitable giving situation or to learn more about charitable planning.

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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 whom the solicitation is being made, and a copy of the contract will be provided upon request. Prospective donors are encouraged to consult their tax advisors regarding their specific tax status before contributing.

Eaton Vance Distributors, Inc. is a paid solicitor which will receive as costs, expenses and fees a portion of the solicited funds raised through the solicitation campaign.

For more complete information about such fees, please see the Trust's Gifting Booklet dated October 2, 2017, as it may be amended.

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