

# Donor-Advised Funds Additional Contribution Form

Use this form if you are making an additional contribution to an existing Donor-Advised Fund Account. In lieu of manually submitting the DAF Additional Contribution Form, login to your DAF account at [uscgt.donorfirstx.com](http://uscgt.donorfirstx.com), select "Contribution" and then "Plan a Contribution". You must still initiate all transfers of securities or cash per the instructions on page 3.

Send this completed form to the Administrator, Ren.

Email: [uscgt@reninc.com](mailto:uscgt@reninc.com), Fax: 1-877-227-3479, or Mail to: 8888 Keystone Crossing, Suite 1200, Indianapolis, IN 46240. If you are contributing securities, also send a completed Letter of Authorization to Transfer Securities.

## Section 1: Charitable Account Information

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Donor Name(s) _____	Daytime Phone _____
Account Name _____	Account Number(s) _____

## Section 2: Contribution Information

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The minimum initial additional contribution per Charitable Account is \$1,000.

Please provide to the best of your knowledge the estimated amounts/number of shares as this information will be used to match the contributions to your Donor-Advised Fund Account.

Check    Check Amount \$ \_\_\_\_\_

Wire    Wire Amount \$ \_\_\_\_\_    Bank Name \_\_\_\_\_

Securities

Amount \_\_\_\_\_ Name of Security \_\_\_\_\_ Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

Amount \_\_\_\_\_ Name of Security \_\_\_\_\_ Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

Amount \_\_\_\_\_ Name of Security \_\_\_\_\_ Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

Amount \_\_\_\_\_ Name of Security \_\_\_\_\_ Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

Amount \_\_\_\_\_ Name of Security \_\_\_\_\_ Symbol \_\_\_\_\_ Number of Shares \_\_\_\_\_

If you are contributing shares of more than five different securities; attach a separate sheet listing the additional securities.

**Note:**

Contributing federally tax-exempt securities or shares of funds holding federally tax-exempt securities is not permitted.

All contributed property must be free and clear of any liens, encumbrances or other adverse claims, and must have been held by the Donor for more than one year at time of contribution.

*If the contributed shares are considered restricted and/or 144 stock, please contact Eaton Vance or Ren to discuss prior to contributing.*

*For additional information on acceptable contributions of securities, please see the Gifting Booklet.*

Transfer from other Charitable Organization

Please note that transfers from other charitable organizations are not considered tax deductible since the deductions were provided when the initial contribution was made to the original organization.

Name of charitable organization (if it's a Donor Advised Fund, include the organization and account name)

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Estimated dollar value \_\_\_\_\_

**Section 3: Signature(s)**

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I/We acknowledge that I/we have read the current Donor-Advised Funds' Gifting Booklet and agree to the terms and conditions described therein. I/we certify that all information provided by me/us in my/our original Application is still complete and accurate, and I/we understand and agree that all of the representations, certifications and warranties that I/we made in my/our original Application shall apply equally to all contributions made by me/us to my/our Charitable Account. I/we understand that any contribution, once accepted, represents an irrevocable contribution to U.S. Charitable Gift Trust and is not refundable.

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Donor 1 Signature

Date

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Donor 1 Name (please print)

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Donor 2 Signature (if applicable)

Date

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Donor 2 Name (please print)

# Contributing to the U.S. Charitable Gift Trust

*In lieu of manually submitting the DAF Additional Contribution Form, login to your DAF account at [uscgt.donorfirstx.com](http://uscgt.donorfirstx.com), select "Contribution" and then "Plan a Contribution". You must still initiate all transfers of securities or cash per the instructions below.*

Please send your completed Donor-Advised Fund Additional Contribution Form to the Administrator, Ren, at the following address, email or fax and follow the asset transfer instructions below.

U.S. Charitable Gift Trust  
c/o Ren  
8888 Keystone Crossing, Suite 1200, Indianapolis, IN 46240

Email: [uscgt@reninc.com](mailto:uscgt@reninc.com)  
Phone: 1-800-664-6901  
Fax: 1-877-227-3479

Contribution Type	Instructions
<b>Cash</b>	
Check	<ul style="list-style-type: none"> <li>Make payable to U.S. Charitable Gift Trust</li> <li>Include the donor name, account name or account number in the memo section of the check</li> <li>Submit check along with Application</li> </ul>
Wire	Bank Name: Wells Fargo Clearing Services, LLC. Bank Address: 420 Montgomery St., San Francisco, CA 94104 Account Name: U.S. Charitable Gift Trust Account Number: 4529914723 ABA #: 121000248 FBO: Donor Name/DAF Account Number (if known)
<b>Securities*</b>	
<p><b>Please note that the U.S. Charitable Gift Trust (USCGT) does not initiate the asset transfer.</b></p> <p>To transfer securities to USCGT, contact the financial institution where the assets are currently held and provide the DTC instructions provided or complete the Letter of Authorization Form (Donors are responsible to submit form to the firm holding assets).</p>	<p><b>DTC Instructions</b></p> <p>Deliver all eligible securities/mutual funds to:</p> <p>Bank Name: Wells Fargo Clearing Services, LLC            Bank Address: 420 Montgomery St., San Francisco, CA 94104            DTC Number: 0141            Account Name: U.S. Charitable Gift Trust            Account Number: 1614-4242            FBO: Donor Name/DAF Account Number (if known)</p>
<b>Transfer from other Charitable Organization</b>	
<p>Submit a grant request from existing donor-advised fund program to contribute assets to the U.S. Charitable Gift Trust FBO of Donor or Account Name. The U.S. Charitable Gift Trust's tax ID is 31-1663020.</p>	
<b>Others</b>	
<p>Please contact the Administrator for additional information about contributing the following:</p>	<ul style="list-style-type: none"> <li>Stock Certificate</li> <li>Stock held with a Transfer Agent</li> <li>Stock held in a Dividend Reinvestment Plan</li> <li>Privately Held/Restricted Stock</li> </ul>

\*Contributing federally tax-exempt securities or shares of funds holding federally tax-exempt securities is not permitted. All contributed property must be free and clear of any liens, encumbrances or other adverse claims, and must have been held by the Donor for more than one year at time of contribution. For additional information on acceptable contributions of securities, please see the Gifting Booklet.

# Letter of Authorization to Transfer Securities

Please note that the U.S. Charitable Gift Trust (USCGT) does not initiate the asset transfer. Complete the Letter of Authorization form only if you are not using your own transfer forms. Submit completed form to financial institution where the assets are currently held.

Instructions to the Broker-Dealer (or other custodian) holding assets: As instructed by the client, please deliver the indicated securities to U.S. Charitable Gift Trust. All transfers are to be made in kind.

**Deliver all eligible securities/mutual funds to:**

Bank Name: Wells Fargo Clearing Services, LLC.  
Bank Address: 420 Montgomery St., San Francisco, CA 94104  
DTC Number: 0141  
Account Name: U.S. Charitable Gift Trust  
Account Number: 1614-4242

FBO: \_\_\_\_\_ Donor Name/DAF Account Number (if known) \_\_\_\_\_

\_\_\_\_\_  
Name of Broker-Dealer (or other Custodian) Holding Assets      Date      Daytime Phone

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
City      State      Zip Code

Dear: \_\_\_\_\_ (Name of Broker-Dealer (or Other Custodian) Holding Assets)

Please accept this letter as my/our authorization to irrevocably transfer the following position(s) from my/our account, provided below to U.S. Charitable Gift Trust.

From: \_\_\_\_\_ (my/our account number)

- |                  |                           |  |
|------------------|---------------------------|--|
| 1. _____         | _____                     | _____  |
| Number of Shares | Approximate Dollar Amount | Name of Security (and symbol, and/or cusip if known) |
| 2. _____         | _____                     | _____  |
| Number of Shares | Approximate Dollar Amount | Name of Security (and symbol, and/or cusip if known) |
| 3. _____         | _____                     | _____  |
| Number of Shares | Approximate Dollar Amount | Name of Security (and symbol, and/or cusip if known) |
| 4. _____         | _____                     | _____  |
| Number of Shares | Approximate Dollar Amount | Name of Security (and symbol, and/or cusip if known) |
| 5. _____         | _____                     | _____  |
| Number of Shares | Approximate Dollar Amount | Name of Security (and symbol, and/or cusip if known) |

If you are contributing shares of more than five different securities, attach a separate sheet listing the additional securities.

**Note:** Contributing federally tax-exempt securities or shares of funds holding federally tax-exempt securities is not permitted. All contributed property must be free and clear of any liens, encumbrances or other adverse claims, and must have been held by the Donor for more than one year at time of contribution. For additional information on acceptable contributions of securities, please see the Gifting Booklet.

I/we represent and warrant that the securities are not restricted for public sale by U.S. Charitable Gift Trust and are not otherwise subject to restrictions pursuant to Rule 144 under the Securities Act of 1933, as amended, or, if they are restricted or are potentially restricted for public sale, I/we have provided information regarding such restrictions or potential restrictions in my/our completed Application or Additional Contribution Form (as applicable) submitted to the Administrator.

Sincerely,

\_\_\_\_\_  
Donor 1 Signature

\_\_\_\_\_  
Donor 1 Name (please print)

\_\_\_\_\_  
Donor 2 Signature (if applicable)

\_\_\_\_\_  
Donor 2 Name (please print)

\_\_\_\_\_  
U.S. Charitable Gift Trust Account Number (if known)

**If the securities being transferred are held at your firm, a Medallion Signature Guarantee may not be required. Please confirm with firm holding the securities if Medallion Signature Guarantee is needed.**

If you have any questions, please contact the Administrator, Ren, at 1-800-664-6901.

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# U.S. Charitable Gift Trust<sup>®</sup>