

## How to Set Up a Donor-Advised Fund in 4 Steps

### 1 Submit Application

Complete a [Donor-Advised Funds \(DAF\) Application](#)

- In addition to the application, please use the [Entity Form](#) when contributing as corporations, nonprofits and other entities
- New users will receive a welcome email from Ren with username and link to password for account portal access

### 2 Initiate Transfer of Assets

Donor initiates transfer of acceptable property\* to the U.S. Charitable Gift Trust® (Gift Trust)

- Instructions are provided in the DAF application
- For securities transfers, please follow up with the firm that holds the shares to see if they've been sent to the Gift Trust
- Once the Donor/Financial Advisor sets up their portal access, the Donor/Financial Advisor can monitor their contribution progress on the account portal

### 3 Asset Delivery

When a Donor contributes acceptable securities, it generally takes a few days for the shares to settle (normally T+3 days)

- When assets are received, the Donor/Financial Advisor will receive an email notification from Ren
- Donor's account will be credited with the net proceeds received from the sale of the Donor's contributed securities or the Donor's cash contribution
- Upon the acceptance of the Donor's contribution, an acknowledgement of the contribution will be made available to the Donor

### 4 Account Funding

Account will be funded in about a week after delivery of the shares

- A contribution acknowledgment letter will be mailed to the Donor. This letter will also be posted on the portal.
- [Online account access](#) for Donors and Financial Advisors:
  - Account value
  - View contribution and grant history
  - Make grant distributions to charities
  - Charitable beneficiary information
  - Correspondence
  - Change account information

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

For more information, contact the U.S. Charitable Gift Trust's administrator, Ren,  
at **800-664-6901**.

#### U.S. Charitable Gift Trust®

The U.S. Charitable Gift Trust (Gift Trust) is a tax-exempt public charity offering donor-advised funds. The Gift Trust is located at Two International Place, Boston, MA 02110. All Gift Trust activities and the participation of Donors in the Gift Trust are subject to the requirements of state and federal law, the terms and conditions of the Gift Trust's Declaration of Trust, the Gift Trust's current Gifting Booklet for Donor-Advised Funds (Gifting Booklet) and the completed Application submitted by each Donor. The Gift Trust's Board of Directors (Board of Directors) reserves the right to modify the Gift Trust's program at any time, subject to the provisions of the Gift Trust's Declaration of Trust and state and federal law. Any contribution to the Gift Trust, 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. The tax consequences of contributing to the Gift Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Nothing in this flyer should be construed as tax advice. The Gift Trust has not been registered under federal securities laws, pursuant to available exemptions. The Gift Trust is not 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. (Placement Agent), is a paid solicitor of the Gift Trust, receiving compensation as described in the Gifting Booklet.

**U.S. Charitable  
Gift Trust®**