



# Contribute to the Sustainable Disaster-Recovery Fund

Use this form to contribute to the Sustainable Disaster-Recovery Fund, our field-of-interest fund that supports recovery efforts in areas affected by major disasters. All gifts into the Sustainable Disaster-Recovery Fund are irrevocable. Grants from the fund are recommended by Vanguard Charitable’s board of trustees.

Contact us  
with questions

donorservice@vanguardcharitable.org

To learn more about the Sustainable Disaster-Recovery Fund visit [www.vanguardcharitable.org/giving-with-vc/living-our-mission](http://www.vanguardcharitable.org/giving-with-vc/living-our-mission)

## 1 Contribution type

The minimum additional contribution is \$5,000.

|  |
|--|
| <p><b>Assets held at Vanguard</b> <i>Complete Section 2a</i><br/>Completing this paperwork will initiate the transfer from Vanguard.</p>   |
| <p><b>Vanguard brokerage money market settlement fund</b> <i>Complete Section 2b</i></p>   |
| <p><b>Assets held outside Vanguard or Vanguard Brokerage Services</b> <i>Complete Section 2c</i><br/>Completing this form will <i>not</i> initiate transfer. See page 5 for delivery and funding instructions.</p> |
| <p><b>Physical stock certificate</b> <i>Complete Section 2d</i></p>  |
| <p><b>Cash gift</b> <i>Complete Section 2e</i><br/>Completing this form will <i>not</i> initiate transfer. See page 5 for delivery and funding instructions.</p>   |

### 2a. Assets held at Vanguard

Use this section to contribute: Vanguard mutual funds held at Vanguard or Vanguard Brokerage Services Stocks, bonds, ETFs, non-Vanguard mutual funds held at Vanguard Brokerage Services.

| Account number | Fund name | Ticker symbol | Number of shares or "All" |
|----------------|-----------|---------------|---------------------------|
|                |           |               |                           |
|                |           |               |                           |
|                |           |               |                           |
|                |           |               |                           |
|                |           |               |                           |

**Specific ID cost basis method only**

Use this section to specify lots. For additional lots, attach extra paper signed and dated by all registered owners. These pages should include the following: account number, fund name, and date shares acquired.

|                       |                           |                             |                                 |
|-----------------------|---------------------------|-----------------------------|---------------------------------|
| <b>Account number</b> | <b>Security/fund name</b> |                             | <b>Ticker symbol</b>            |
|                       |                           |                             |                                 |
|                       | <b>Number of shares</b>   | <b>Date shares acquired</b> | <b>Purchase price per share</b> |
| <b>Lot 1</b>          |                           |                             | \$                              |
| <b>Lot 2</b>          |                           |                             | \$                              |
| <b>Lot 3</b>          |                           |                             | \$                              |

**Note:** If you prefer to use specific identification for this transaction, but your account is using the average cost basis method, either by your affirmative election or Vanguard's default, you must change your cost basis method to specific identification in writing. Contact Vanguard for more information.

**2b. Vanguard brokerage money market settlement fund**

|  |                      |
|--|----------------------|
| <b>Vanguard Brokerage Account number</b> <i>8 digits</i> | <b>Dollar amount</b> |
|  | \$                   |

**2c. Security or mutual fund held outside Vanguard or Vanguard Brokerage Services**

Use this section to contribute assets held outside of Vanguard. Contributions will be processed based on number of shares, not approximate value. Please contact your sending firm in advance to relay the preferred cost basis.

| <b>Security/fund name</b> | <b>Ticker symbol</b> | <b>Number of shares</b> | <b>Approximate value</b> |
|---------------------------|----------------------|-------------------------|--------------------------|
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |

**2d. Physical stock certificate**

Use this section to contribute assets held outside of Vanguard. Contributions will be processed based on number of shares, not approximate value.

| <b>Security/fund name</b> | <b>Ticker symbol</b> | <b>Number of shares</b> | <b>Approximate value</b> |
|---------------------------|----------------------|-------------------------|--------------------------|
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |
|                           |                      |                         | \$                       |

**2e. Cash gift**

Vanguard Charitable will update this form to match assets as received.

Check      Wire      ACH/EFT

|                     |   |
|---------------------|---|
| Dollar amount<br>\$ | Approximate send date <i>mm-dd-yyyy</i> |
|---------------------|---|

**2 Donor information**

Identify all registered owners of the assets being donated.  
All individual owners, joint owners, trustees, and/or co-trustees must be represented.

If you selected **Individual, Joint** do not complete these fields.

A current Corporate/organization standing certification must be submitted or on file at Vanguard Charitable for any gift over \$10M.

Vanguard Charitable will send a tax substantiation letter to this address.

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Individual, Joint      Trust, Organization, Corporation

|   |  |
|---|--|
| Name of Trust/Organization                          |  |
| Taxpayer Identification Number <i>last 4 digits</i> | Trust agreement date <i>mm-dd-yyyy</i> |

**Owner/Trustee/Officer A**

|   |                  |        |     |
|---|------------------|--------|-----|
| Name <i>salutation, first, middle initial, last</i> | Last 4 digits of | SSN or | PIN |
| Title at organization                               |                  |        |     |
| Birth date <i>mm-dd-yyyy</i>                        | Preferred phone  |        |     |
| Mailing address or P.O. box number                  |                  |        |     |
| City  | State            | Zip    |     |
| Email address                                       |                  |        |     |

**Owner/Trustee/Officer B**

|   |                  |        |     |
|---|------------------|--------|-----|
| Name <i>salutation, first, middle initial, last</i> | Last 4 digits of | SSN or | PIN |
| Title at organization                               |                  |        |     |
| Birth date <i>mm-dd-yyyy</i>                        | Preferred phone  |        |     |
| Mailing address or P.O. box number                  |                  |        |     |
| City  | State            | Zip    |     |
| Email address                                       |                  |        |     |

### 3 Authentication for assets transferred from Vanguard

Additional authentication is required if you are contributing assets valued over \$2 million or more at Vanguard. Authentication for these assets must be completed using one of the following:

#### 3a. Vanguard voice verification™

|  |
|--|
| <p>Check this box if you intend to use Vanguard voice verification in lieu of signature guarantee. However, you must be enrolled in the service, which can take up to one week to complete. For more information or to register, contact your Vanguard representative.</p> |
| <p>Name of your Vanguard representative <i>if known</i></p>  |

#### 3b. Signature guarantee or Medallion signature guarantee

All registered owners must be present for the Signature guarantee or Medallion signature guarantee. Ensure with your bank or broker that the Medallion signature guarantee(s) provided will cover the amount of the gift.

A notary public cannot provide a Signature guarantee or Medallion signature guarantee. ▶

|   |                         |
|---|-------------------------|
| <p>Signature of authorized officer</p>              | <p>Place stamp here</p> |
| <p>Authorized officer's title</p>                   |                         |
| <p>Name of institution</p>                          |                         |
| <p>Date <i>mm-dd-yyyy</i></p>                       |                         |
| <p>This applies to all signatures in Section 4.</p> |                         |

### 4 Required signatures

By signing below, I authorize the transfer of the assets described in Section 2 to Vanguard Charitable. I acknowledge that my gift of the property described in Section 2 will be irrevocable and unconditional when received and accepted by Vanguard Charitable. I acknowledge that I have read and agree to abide by the terms and conditions set forth in Vanguard Charitable's *Policies & Guidelines* booklet, which will be amended from time to time. I hereby certify, to the best of my knowledge, that all information presented in connection with this form and contribution is accurate and that I will notify Vanguard Charitable promptly of any changes. I confirm I have the full authority to enter into this agreement or to recommend a grant from another donor-advised fund wherein the sponsoring organization is the owner of the funds transferred to Vanguard Charitable.

If a Medallion signature guarantee is required for your contribution, do not sign unless you are in the presence of an authorizing officer.

|  |                               |
|--|-------------------------------|
| <p>Signature of owner/trustee/officer A</p> <p>X</p> | <p>Date <i>mm-dd-yyyy</i></p> |
|--|-------------------------------|

|  |                               |
|--|-------------------------------|
| <p>Signature of owner/trustee/officer B</p> <p>X</p> | <p>Date <i>mm-dd-yyyy</i></p> |
|--|-------------------------------|

## 5 Instructions for transferring assets

### Assets held outside Vanguard or Vanguard Brokerage Services

- Receiving firm: Vanguard Brokerage Services
- Vanguard Charitable brokerage account number: 76580331
- DTC clearing number: 0062
- Further credit to: [Your Vanguard Charitable account number and name]
- Please ensure you have relayed your preferred cost basis when providing delivery instructions.

### Physical stock certificate

Send a completed Letter of authorization form with a Medallion signature guarantee, and properly endorse the certificate.

- Write "Vanguard Brokerage Services" between the words "appoint" and "attorney" on the back of each certificate.
- Fill in the current date and sign your name exactly as it appears on the front of the certificate. All registered owners must sign in the presence of an authorizing officer.
- Obtain a Medallion signature guarantee.

### Cash gift

#### Contribution by Check

To complete your contribution by check to Vanguard Charitable, please enclose this form with your check and mail to the following addresses listed below, as applicable.

Please make your check out to **Vanguard Charitable Endowment Program**.

By U.S. mail:

Vanguard Charitable  
P.O. BOX 9509  
Warwick, RI 02889-9509

By registered, certified, or overnight mail:

Vanguard Charitable  
2670 Warwick Avenue  
Warwick, RI 02889-9509

#### Contribution by Wire

Contribution by wire, provide your bank with wiring instructions.

- Wire to: FRB ABA 011001234 - The Bank of New York Mellon, 225 Liberty St., New York, NY 10286
- For credit to: Account 0724947 - Vanguard Charitable Endowment Program
- Make payable to Vanguard Charitable Endowment Program.

### Contribution by Electronic Bank Transfer (ACH/EBT)

To complete your contribution by EBT to Vanguard Charitable, you must both inform Vanguard Charitable of your intended donation and instruct your bank to send Vanguard Charitable the donation.

**Note:** Each bank has a different process and timeframe for processing EBT contributions. We recommend you confirm with your bank that the transaction has been completed.

1. Login to your bank's website.
2. Initiate an Electronic Bank Transfer, which is often achieved using the "Bill Pay" functionality on a bank's secure website. (EBTs are processed through the Automated Clearing House network). If this option is not available, please contact your bank for assistance.
3. Search the "biller," "Merchant," or "Remit To" organization for "Vanguard Charitable Endowment Program." If you cannot find the name on your list of approved recipients, enter the following information:

Vanguard Charitable  
P.O. BOX 9509  
Warwick, RI 02889-9509

### Return information

Return this form and required documentation to Vanguard Charitable. If the document has a Signature guarantee or Medallion signature guarantee, it must be mailed.

|   |  |
|---|--|
| <b>Email:</b>                                   | donorservice@vanguardcharitable.org<br><i>We recommend encrypting the form and sharing the password with us.</i> |
| <b>Fax:</b>                                     | 866-485-9414   |
| <b>Mail:</b>                                    | P.O. Box 9509<br>Warwick, RI 02889-9509  |
| <b>Registered, certified or overnight mail:</b> | 2670 Warwick Avenue,<br>Warwick, RI 02889-9509   |