



Intent to Give

Use this form to notify Vanguard Charitable and the executor of your Will or a designated attorney of your intention to gift a portion of your estate’s assets into a philanthropic account. Gifts may be a bequest from your Will, IRA, 401(k), or other retirement plan, trust, or insurance policy. Deferred gifts require planning and careful execution.

Contact us
with questions

donorservice@vanguardcharitable.org

To finalize the intended gift upon your death, the estate must initiate the contribution of assets into a new or existing philanthropic account and complete all required paperwork. We recommend retaining a copy of this form for your records.

Read more about planned and deferred giving by visiting vanguardcharitable.org/contributions/deferred-giving. Please see the Policies & Guidelines for additional details vanguardcharitable.org/company-policies/policies-and-guidelines.

This form is not legally binding and can be amended, changed, or disregarded at any time. Seek the guidance of a professional advisor when planning your estate or amending estate plans. Retain this document and share with appropriate family members, advisors, and nonprofit organizations.

If you would like to share additional information or supporting documentation with Vanguard Charitable, please email us at donorservice@vanguardcharitable.org.

A letter to the executor of my estate:

I bequeath the amount and/or property and/or percent of my residuary estate described in Section 3 to Vanguard Charitable (EIN 23-2888152), a nonprofit organization located in Malvern, Pennsylvania.

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Account Information

Current Account	Future Account
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If you do not already have an account with Vanguard Charitable, when this gift is bequeathed, it will create a new philanthropic account. If multiple Intent to Give forms are submitted by one individual, they will only create one philanthropic account. If you have a current philanthropic account that you wish this gift to be contributed to, please list the account name and number below.

For new accounts, you may select a name for the account or put N/A to allow future advisors to name the account. An account number will be assigned when the new account is created. Unless anonymity is requested when grants are recommended, the philanthropic account name will appear on correspondence with organizations that receive grants from this account. Please do not use the words “trust,” “endowment,” “fund,” or “foundation.” The account name will appear as “The name that has been chosen Fund.”

Account Number	Account Name
A	The Fund

Later in this form you will be asked to select how this account will be managed.

2 Donor Information

Identify all current registered owners of the assets to be donated. If submitting multiple registration types, please print additional copies of sections two and three to list out each additional registration type, corresponding assets, and firm

Registration Type

Individuals	Estate of Individuals	Trust	Organization
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Primary Owner/Trustee/Officer

Name salutation, first, middle initial, last		
Last 4 digits of SSN		Birth Date mm-dd-yyyy
Street address or P.O. box number		
City	State	Zip
Email Address		Preferred Phone

Secondary Owner/Trustee/Officer (If applicable.)

Name salutation, first, middle initial, last		
Last 4 digits of SSN		Birth Date mm-dd-yyyy
Street address or P.O. box number		
City	State	Zip
Email Address		Preferred Phone

3 Contribution Information

The minimum initial contribution to open a new account is \$25,000, and \$5,000 for additional contributions. The minimum contribution for existing accounts is \$5,000. If you require extra space, or wish to include multiple assets, please include additional sheets.

Is Vanguard Charitable designated as the primary or contingent beneficiary of the gift?

Primary Beneficiary	Contingent Beneficiary
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Asset Type

Bequest under a Will or codicil
Cash
Charitable Trust, Complex Asset, Estate/Property
Insurance Policy
Non-Charitable Trust
Non-Retirement Brokerage Account
Retirement Account
Other

Estimated Donation Amount this can be listed as a dollar amount, percentage of estate, etc.

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Custodian/Firm Current firm account information. If submitting assets from multiple custodians or firms, please include all, using additional sheets as necessary.

Custodian/Firm Name		
Custodian/Firm Contact Name salutation, first, middle initial, last		
Street address or P.O. box number		
City	State	Zip
Email Address	Preferred Phone	
Please add any additional details you would like to provide here.		

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Executor Information

Executor Contact Name <small>salutation, first, middle initial, last</small>		
Executor Date of Birth		
Street address or P.O. box number		
City	State	Zip
Email Address	Preferred Phone	

5 Account Activity

Please complete this section whether you are creating a new account or adding to an existing account. The more information you include in your plans, the more effectively your executor can implement your requests. Please detail below how the bequeathed funds should be handled. If you require extra space, include additional sheets.

Do you have an existing succession plan on file that should be followed?

Yes, this should follow my existing succession/legacy plan on file. (If making this selection, no need to complete the remaining sections.)	No, I will submit a new or updated succession plan.
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If you have an existing account and selected to update or submit a new succession plan, please make these changes in you online account or complete and submit a Succession Plan form available at vanguardcharitable.org/forms.

How should granting be managed? (Select one)

Nominate a maximum of two Account Advisors Advisors have ongoing account privileges and access to recommend grants, select investment options, and revise the succession plan. If you make this selection, please recommend up to two advisors below.
Create New Accounts Divide assets equally and create one or more new accounts, each with up to two successor-advisors. The minimum to open a new account is \$25,000. If creating multiple accounts, please use additional copies of section five to list each new account and up to two Account Advisors per account. If funds are insufficient to support the creation of the multiple accounts requested, the first two listed Account Advisors will be added to one account.
Recommend an Endowed Grant Plan If you make this selection, please complete and submit a Recommend an Endowed Grant Plan form available at vanguardcharitable.org/forms .

Account Advisor A (Complete if you selected to nominate account advisors)

Name salutation, first, middle initial, last		
Last 4 digits of SSN	Birth Date mm-dd-yyyy	
Relationship to donor		
Street address or P.O. box number		
City	State	Zip
Email address	Preferred phone	

Account Advisor B (If applicable.)

Name salutation, first, middle initial, last		
Last 4 digits of SSN	Birth Date mm-dd-yyyy	
Relationship to donor		
Street address or P.O. box number		
City	State	Zip
Email address	Preferred phone	

Important Information

To ensure your assets are gifted to Vanguard Charitable, we recommend following two steps. (1) When planning your estate, include in writing your intention to gift a portion of your estate’s assets to Vanguard Charitable. (2) Alert Vanguard Charitable to your intentions by submitting this form.

Naming your donor-advised fund as a beneficiary: Another option for making contributions into your donor-advised fund account at your passing is to name Vanguard Charitable as a beneficiary for any of a variety of assets you may hold. Depending on the asset, this approach may protect your heirs from substantial tax burdens.

Succession Plans: Succession plan options are intentionally flexible. They can be changed or amended at any time. You can name a maximum of two successor-advisors to the account that will be created with this gift on a Succession Plan. All advisors have ongoing account privileges and access. The Succession Plan Form can be found by visiting vanguardcharitable.org/forms.

Endowed Grant Plan: Recommend that one or more charities receive a recurring grant based on a percentage of your gift through an Endowed Grant Plan. The Endowed Grant Plan Form can be found by visiting vanguardcharitable.org/forms.

Individual Retirement Accounts: Naming Vanguard Charitable as a direct beneficiary of your individual retirement accounts at your death can be tax-efficient for your estate and your heirs. In addition, the full amount of the account will benefit the charities of your choice because charities do not pay income tax. (Donating individual retirement accounts during your lifetime is a reportable taxable event. Please consult with your tax advisor.)

Life Insurance Policy: Name a charitable organization as the beneficiary of your life insurance policy and you can remove the death benefit from your taxable estate. The charity will receive the full death benefit with no tax obligation. Vanguard Charitable also accepts life insurance policies donated during one’s lifetime; in this case, the income tax deduction is generally equal to the policy’s cash value.

Charitable Trust: When you designate Vanguard Charitable as the charitable beneficiary of a charitable lead or charitable remainder trust, you’ll enjoy the flexibility of implementing a customized succession plan. This plan can support multiple charities over time through your donor-advised fund, rather than just a single charity.

Instructions for naming your DAF as a beneficiary:
Request a beneficiary form from the bank or entity that administers the asset. In most cases, this can be done online. Identify Vanguard Charitable as the sole beneficiary or one of many beneficiaries. Include the specific account number for your DAF account (i.e., “for benefit of The _____ Fund, account number _____”).
If asked for the beneficiary’s social security number, you can use Vanguard Charitable’s Employer Identification Number (EIN): 23-2888152.
If asked for the beneficiary’s date of birth, you can use Vanguard Charitable’s date of incorporation: 02/27/1997.
If asked for the beneficiary’s address, you can use Vanguard Charitable’s mailing address:
Vanguard Charitable, P.O. Box 9509, Warwick, RI 02889-9509

Return information

Return this form and required documentation to Vanguard Charitable.

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