



# Make a contribution

Use this form to contribute to a philanthropic account. Contributions are irrevocable upon acceptance by Vanguard Charitable.

If you require extra space, include additional sheets. Please do not staple.

For more information, refer to our *Policies & Guidelines*.

Did you know, you can contribute to your philanthropic account online?  
Visit [vanguardcharitable.org](http://vanguardcharitable.org) and click Login.

Contact us  
with questions

[donorservice@vanguardcharitable.org](mailto:donorservice@vanguardcharitable.org)

## 1 Account information

Provide Vanguard Charitable account information.

Account number	Account name	Fund
A	The	

## 2 Contribution type

The minimum additional contribution is \$5,000.

### Assets held at Vanguard Complete Section 2a

Completing and returning this paperwork will initiate the transfer from Vanguard.

### Vanguard brokerage money market settlement fund Complete Section 2b

Completing and returning this paperwork will initiate the transfer from Vanguard.

### Assets held outside Vanguard or Vanguard Brokerage Services Complete Section 2c

Completing and returning this form will *not* initiate transfer. See page 7–8 for delivery and funding instructions.

### Physical stock certificate Complete Section 2d

### Cash gift Complete Section 2e

Completing and returning this form will *not* initiate transfer. See page 7–8 for delivery and funding instructions.

### 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 Contributions will be processed based on number of shares, not approximate value. All fields required unless otherwise noted.

Account number	Fund or security name	Ticker symbol	Number of shares or "All"	Approximate value

**Specific ID cost basis method only (optional)**

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. All fields required unless otherwise noted.

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

**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**

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

**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 see funding instructions on page 7 to initiate transfer of assets. Please contact your sending firm in advance to relay the preferred cost basis. All fields required unless otherwise noted.

Name of Brokerage Firm	Brokerage Account number

Security/fund name	Ticker symbol	Number of shares	Approximate value
			\$
			\$
			\$
			\$
			\$

**2d. Physical stock certificate**

Use this section to contribute paper stock certificates. Contributions will be processed based on number of shares, not approximate value. Please see funding instructions on page 7 to initiate transfer of assets. All fields required unless otherwise noted.

Security/fund name	Ticker symbol	Number of shares	Approximate value
			\$
			\$
			\$

**2e. Cash gift**

Vanguard Charitable will update this form to match assets as received. Please see pages 7–8 for instructions on completing the transfer of assets. All fields required unless otherwise noted.

Check      Wire      ACH/EBT

Dollar amount \$	Approximate send date <i>mm-dd-yyyy</i>
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**3 Donor information**

Identify all registered owners of the asset(s) being donated. Names included in Sections 3a and 3b must match the signatures on page 6. Vanguard Charitable will send a tax substantiation letter to the donor(s) at the address provided below, if applicable. For more information, view our Policies & Guidelines. If you are contributing from a trust, corporation, or other organization, a current Corporate/Organization Standing Certificate must be on file for all gifts over \$10 million.

*If you selected individual, Joint, you do not need to complete these fields.*

Individual, Joint    or    Trust, Organization, Corporation

Name of trust/organization	Taxpayer Identification Number <i>last 4 digits</i>
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**3a. Primary Donor/Trustee/Owner**

*Please complete these fields for all selections above. Vanguard Charitable will send a tax substantiation letter to this address.*

Name <i>salutation, first, middle initial, last</i>			
Last 4 digits of	SSN or	PIN	Birth date <i>mm-dd-yyyy</i>
Mailing address or P.O. box number			
City		State	Zip
Address type	<input type="checkbox"/> Business <input type="checkbox"/> Home <input type="checkbox"/> Mailing <input type="checkbox"/> Other		
Email address	Preferred phone		

**3b. Joint Donor/Trustee/Owner**

*Please complete these fields for all selections above. Vanguard Charitable will send a tax substantiation letter to this address.*

Name <i>salutation, first, middle initial, last</i>			
Last 4 digits of	SSN or	PIN	Birth date <i>mm-dd-yyyy</i>
Mailing address or P.O. box number			
City		State	Zip
Address type	<input type="checkbox"/> Business <input type="checkbox"/> Home <input type="checkbox"/> Mailing <input type="checkbox"/> Other		
Email address	Preferred phone		

## 4 Related donors

IRS guidelines require Vanguard Charitable to track donations from related parties. List below the names of any relatives (or organizations on whose behalf you have the authority to act) who have donated to Vanguard Charitable.

Related party

**Name** *salutation, first, middle initial, last*

**Relationship to donor**

## 5 Investment options

Contribution proceeds may be invested in any combination of the investment options listed below. Information on our current investment options and performance is available at [vanguardcharitable.org/investments](http://vanguardcharitable.org/investments). Leave this section blank to have 100% of the proceeds invested according to the account's current allocation, excluding TIFF Multi-Asset Pool.

<b>Portfolio Solutions</b>	
Income	%
Conservative Growth	%
Moderate Growth	%
Growth	%
Wellington	%
Balanced Index	%
<b>Portfolio Builders</b>	
<b>Index</b>	
Short-Term TIPS	%
Total Bond	%
Total International Bond	%
Total Equity	%
Total U.S. Stock	%
S&P 500	%
Large Cap Growth	%
Large Cap Value	%
Real Estate	%
Extended Market	%
Total International Stock	%
Emerging Markets	%
European Stock	%
Pacific Stock	%
<b>Active</b>	
Money Market	%
Ultra-Short-Term Bond	%
Short-Term Bond	%
Core Bond	%
High-Yield Corporate	%
Dividend Growth	%
U.S. Growth	%
Windsor II	%
Explorer	%
International Core Stock	%
Commodity Strategy	%
<b>Values-Driven</b>	
ESG U.S. Stock	%
ESG Global Stock	%
Global Positive Impact	%
ESG International Stock	%

Total must  
equal 100%.

## 6 Authentication for assets transferred from Vanguard

Additional authentication is required if you are contributing assets valued over \$10 million at Vanguard. Authentication for these assets must be completed using one of the following:

### 6a. Vanguard voice verification™

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.

Name of your Vanguard representative *if known*

### 6b. 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.

Signature of authorized officer	Place stamp here
Authorized officer's title	
Name of institution	
Date <i>mm-dd-yyyy</i>	

This applies to all signatures in Section 7.

## 7 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*, 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.

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

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

## 8 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.

If you are contributing a mutual fund held outside Vanguard or Vanguard Brokerage Services, and the holding firm cannot initiate the transfer, send a completed **Letter of authorization** form with a Medallion signature guarantee and an official account statement less than 90 days old from your current institution.

### 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:	By registered, certified, or overnight mail:
Vanguard Charitable P.O. BOX 9509 Warwick, RI 02889-9509	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  
Phone: 888-383-4483

4. Specify the amount of your donation and—if available—the effective date you would like the contribution to be processed.
5. Add your vanguard Charitable account number and name to the "memo," "notes," or "additional information" field of your EBT transfer request.

### 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.

Email: [donorservice@vanguardcharitable.org](mailto: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