



Open a philanthropic account

Contact us
with questions
donorservice@vanguardcharitable.org

Use this form to open a philanthropic account and make an initial irrevocable contribution of at least \$25,000.

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

Before completing this form, refer to our *Policies & Guidelines*.

1 Account information

Choose a name for your philanthropic account ("The Williams Family Charitable Fund," for example). Unless you request anonymity when you recommend grants, the name below will appear on correspondence with organizations that receive grants from this account.

Do not use the words "trust," "endowment," "fund," or "foundation."

Account name The Fund

2 Account advisor information

Name a maximum of two advisors to the account. All advisors have ongoing account privileges and access. While some account activities must be initiated and approved by all account advisors, many may be completed by one account advisor. Please see *Policies & Guidelines* for additional details.


Primary Advisor


Name <i>salutation, first, middle initial, last</i>			
Last 4 digits of SSN or PIN	Birth date <i>mm-dd-yyyy</i>		
Preferred phone		Alternate phone	
Primary	Mobile	Other	Primary Mobile Other
Mailing address or P.O. box number			
City		State	Zip
Address type			
Business	Home	Mailing	Other
Email address		Preferred contact method	
		Email	Phone Mail
Signature of new primary account advisor			Date <i>mm-dd-yyyy</i>
X			

Acknowledge you read and agree to abide by the terms and conditions in our *Policies & Guidelines*.

Secondary advisor

Name <i>salutation, first, middle initial, last</i>					
Last 4 digits of SSN or PIN			Birth date <i>mm-dd-yyyy</i>		
Preferred phone Primary Mobile Other			Alternate phone Primary Mobile Other		
Mailing address or P.O. box number					
City				State	Zip
Address type Business Home Mailing Other					
Email address				Preferred contact method Email Phone Mail	
Relationship to current account advisor A					

Acknowledge you read and agree to abide by the terms and conditions in our *Policies & Guidelines*. 

Signature of new secondary account advisor 	Date <i>mm-dd-yyyy</i>
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3 Succession plan

Clients may choose one or multiple options to complete your succession plan. Choose what will happen to your account when all advisors are unable or unwilling to manage account processes. If a valid succession plan is not in effect, remaining account assets will be transferred to The Philanthropic Impact Fund.*

If checked, complete Section 3a. ▶	<p>Option 1: Pass current account privileges to others. Retain the assets in your account and appoint up to two successor-advisors. <i>Please note, successor-advisors cannot be listed as a current advisor on the same account.</i></p>	%
If checked, complete Section 3b. ▶	<p>Option 2: Create new accounts. Divide account assets equally and create one or more new accounts, each with up to two successor-advisors. The minimum initial amount for each account is \$25,000. If creating multiple new accounts, each with up to two successor-advisors and require more space to provide information, please attach additional pages of section 3a signed and dated by at least one current account advisor. If the account balance is not sufficient to support this option when the succession plan is enacted, successor advisors will be made account advisors on the existing philanthropic account.</p>	%
If checked, complete a <i>Recommend an Endowed Grant Plan</i> form. ▶	<p>Option 3: Recommend final grants to charity. Recommend one or more charities receive a final, lump-sum grant from your account. All grants are subject to review and approval at the time the succession plan is enacted.</p>	%
If checked, complete a <i>Recommend an Endowed Grant Plan</i> form. ▶	<p>Option 4: Establish recurring grants with an Endowed Grant Plan. Recommend recurring grants based on a percentage of the account's balance. <i>This option is not in effect until Vanguard Charitable receives a completed Recommend an Endowed Grant Plan form, which is available at vanguardcharitable.org.</i></p>	%
If checked, complete a <i>Recommend an Endowed Grant Plan</i> form. ▶	<p>Option 5: Transfer assets to The Philanthropic Impact Fund. The Philanthropic Impact Fund is managed by our board of trustees and used to grant to a variety of charitable causes.</p>	%
	<p>Total must equal 100%. ▶</p>	<p>Total %</p>

*We highly recommend that each of our Account Advisors undergo an annual review of their Succession Plan. This will ensure that our records remain up-to-date even as your plans continue to evolve. Ultimately, know that it's our goal to ensure that your charitable intentions are met.

3a. Successor-advisors

If you selected Option 1 or 2 as a succession plan, name successor-advisors here. At least one successor-advisor must be the age of majority at the time the succession plan is enacted. Minors may be named as successors, but they cannot assume account privileges until they reach the age of majority. In the interim, a trusted legal guardian can administer account activity. If any successor-advisors are minors please contact us to provide additional information regarding their legal guardians.

Successor-advisors will not receive account privileges until the Succession Plan is enacted or unless they are named an Interested Party on the account.

Successor advisors cannot be current advisors on the same account. If you selected Option 2, intend to create multiple accounts with Successor Advisors, and need more space to provide information, please attach additional pages. If the account balance is not sufficient to support this option when the succession plan is enacted, successor advisors will be made account advisors on the existing philanthropic account. All fields are required unless otherwise noted.

Successor-advisor A

Name <i>salutation, first, middle initial, last</i>			
Title <i>if applicable</i>			
Birth date <i>mm-dd-yyyy</i>		Preferred phone	
		Primary	Mobile Other
Street address or P.O. box number			
City		State	Zip
Address type			
Business	Home	Mailing	Other
Email address			
Relationship to current account advisors			

Successor-advisor B

Name <i>salutation, first, middle initial, last</i>			
Title <i>if applicable</i>			
Birth date <i>mm-dd-yyyy</i>		Preferred phone	
		Primary	Mobile Other
Street address or P.O. box number			
City		State	Zip
Address type			
Business	Home	Mailing	Other
Email address			
Relationship to current account advisors			

3b. Nonprofit organizations

If you selected Option 3 as a succession plan, name the nonprofit organizations here. To nominate more than two charities, include additional sheets signed and dated by at least one account advisor. The total percentage for all organizations listed in this section must equal 100%.

Fractional percentages out to two decimal places are acceptable, example - 1.25%

Specify the percentage to be granted to this charity.

► **Organization A** %

Charity information

Grants are made payable to charity's legal name, which may differ from its common name. Please ensure that your selection is an eligible charity.

Charity legal name		EIN <i>if available</i>
Street address or P.O. box number		
City	State	Zip

Charity contact

Primary contact <i>if available first and last name</i>	
Primary contact title	
Preferred phone	Email address

Grant purpose

General operating expenses
Unrestricted gift
Other:

Grant recognition

Account name only No contact information	Anonymous No identifying or contact information
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Specify the percentage to be granted to this charity. ▶

Organization B %

to charity's legal name, which may differ from its common name. Please ensure that your selection is an eligible charity. ▶

Charity information

Charity legal name		EIN <i>if available</i>	
Street address or P.O. box number			
City		State	Zip

Enter the name of an individual at the charity who can answer questions about the grant. ▶

Charity contact

Primary contact <i>first and last name</i>	
Primary contact title	
Preferred phone	Email address

Grant purpose

General operating expenses
Unrestricted gift
Other:

Grant recognition

Account name only No contact information	Anonymous No identifying or contact information
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4 Charity ineligibility

Select **one** way grants will be distributed if a named charity no longer exists. ▶

<p>Option 1: Reallocate grants among other named charities.</p>
<p>Option 2: Select from a list of alternative charities provided by the account advisors. (Include with this form a list, signed and dated, of secondary charities.) If no list is provided, Vanguard Charitable will choose an alternative organization that most closely resembles the original charity.</p>
<p>Option 3: Distribute the grant to Vanguard Charitable's Philanthropic Impact Fund.</p>

5 Referral information

Tell us how you learned about Vanguard Charitable. Check all that apply.

Web advertisement
Vanguard Charitable website
Vanguard Charitable email
Vanguard Charitable representative
Vanguard representative
Vanguard website
Professional advisor Name of the advisor:
Family member Name of your family member:
Friend Name of your friend:
Website other than Vanguard Charitable or Vanguard Specific website:
Event Specific event:
Newspaper/magazine article Title of the publication:
Other <i>please specify</i>

Continue
to contribute
to this account ▶

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Make a contribution

Use this form to make an initial contribution to your 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 and click Login.

6 Contribution type

Minimum initial contribution is \$25,000. Additional contributions must be a minimum of \$5,000.

<p>Assets held at Vanguard <i>Complete Section 6a</i> Completing this paperwork will initiate the transfer from Vanguard.</p>
<p>Vanguard brokerage money market settlement fund <i>Complete Section 6b</i> Completing this paperwork will initiate the transfer from Vanguard.</p>
<p>Assets held outside Vanguard or Vanguard Brokerage Services <i>Complete Section 6c</i> Completing this form will <i>not</i> initiate transfer. See page 14 for delivery and funding instructions.</p>
<p>Physical stock certificate <i>Complete Section 6d</i></p>
<p>Cash gift <i>Complete Section 6e</i> Completing this form will <i>not</i> initiate transfer. See pages 14 & 15 for delivery and funding instructions.</p>

6a. 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.

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.

Account number	Security/fund name	Ticker symbol
	Number of shares	Date shares acquired
Lot 1		Purchase price per share
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.

6b. Vanguard brokerage money market settlement fund

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

6c. 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 use funding instructions on Page 14 to initiate transfer of assets. Please contact your sending firm in advance to relay the preferred cost basis.

Name of Brokerage Firm	Brokerage Account number

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

6d. 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. Please use funding instructions on Page 14 to initiate transfer of assets.

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

6e. Cash gift

Vanguard Charitable will update this form to match assets as received. Please see pages 14 & 15 for instructions on completing the transfer of assets.

Check Wire ACH/EBT

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

Identify all registered owners of the asset(s) being donated. Names included in Sections 7a and 7b must match the signatures on page 13. 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.

Individual, Joint or Trust, Organization, Corporation

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

Name of trust/organization
Taxpayer Identification Number <i>last 4 digits</i>

7a. 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 Business Home Mailing Other			
Email address		Preferred phone	

7b. 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 Business Home Mailing Other			
Email address		Preferred phone	

8 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 <i>salutation, first, middle initial, last</i>
Relationship to donor

9 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. If no allocation is selected, Vanguard Charitable will default the allocation of your new account to Conservative Growth.

Portfolio Solutions investment options ▶	Income	%
	Conservative Growth	%
	Moderate Growth	%
	Growth	%
	Money Market	%
	Short-Term Bond	%
	Short-Term Inflation-Protected Securities	%
	Total Bond	%
	Total International Bond	%
	Total Equity	%
Portfolio Builders investment options ▶	Total U.S. Stock	%
	S&P 500	%
	Large-Cap Value	%
	Large-Cap Growth	%
	Total International Stock	%
	Extended Market	%
	Balanced Index	%
	Wellington	%
	European Stock	%
	Pacific Stock	%
Value-Driven investment options ▶	Emerging Markets Stock	%
	ESG U.S. Stock	%
	ESG International Stock	%
	ESG Global Stock	%

Total must equal 100%. ▶

10 Authentication for assets transferred from Vanguard

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

10a. 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>

10b. 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>This applies to all signatures in Section 10.</p>
<p>Authorized officer's title</p>	
<p>Name of institution</p>	
<p>Date <i>mm-dd-yyyy</i></p>	

11 Required signatures

By signing below, I authorize the transfer of the assets described in Section 6 to Vanguard Charitable. I acknowledge that my gift of the property described in Section 6 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.

<p>Signature of owner/trustee/officer A</p> <p>X</p>	<p>Date <i>mm-dd-yyyy</i></p>
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<p>Signature of owner/trustee/officer B</p> <p>X</p>	<p>Date <i>mm-dd-yyyy</i></p>
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12 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:

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
 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 <i>We recommend encrypting the form and sharing the password with us.</i>
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