



# Advisors Charitable Gift Fund

## *Additional Gifts*

*In Partnership with*

BOSTON PRIVATE BANK  
& TRUST COMPANY

*The Donor Advised Funds described in this application are a program of Advisors Charitable Gift Fund, Inc. ACGFund is a public charity and donor advised fund.*

*Advisors Charitable Gift Fund is recognized by the Internal Revenue Service as a public charity under IRS Code Section 501(c)(3). Therefore, donations to the fund are irrevocable charitable gifts when made and cannot be returned.*



Please mail or fax this Additional Gift Agreement and all attachments to:

Thomas Forese, Jr., President

Advisors Charitable Gift Fund  
4A Gill Street  
Woburn, Massachusetts 01801  
Phone: 877-677-ACGF  
Fax: 781-935-5059



**ACGFund**  
**Donor Information & Gift Agreement**

Date: \_\_\_\_\_  
 [Month / Day / Year]

To: The Directors of Advisors Charitable Gift Fund

It is my/our desire to make an additional irrevocable gift for the following Donor Account with Advisors Charitable Gift Fund ("ACGFund").

\_\_\_\_\_  
 [Name of fund, i.e., The Jackson Family Giving Fund, All-Africa Education Fund, etc.]

\_\_\_\_\_  
 [ACGFund Account Number]

I/We irrevocably gift and transfer to the Advisors Charitable Gift Fund ("ACGFund") the property (cash, stocks, mutual funds, etc.) described on the following pages and attached to this agreement, and acknowledge the representations and warranties made at the time of my/our original gift are true.

\_\_\_\_\_  
 [Donor A – signature]

\_\_\_\_\_  
 [Donor B – signature]

\_\_\_\_\_  
 [Donor A – name printed]

\_\_\_\_\_  
 [Donor B – name printed]

*Please turn the page....*

## Charitable Contribution

ACGFund, working in partnership with Boston Private Bank & Trust Company, welcomes initial contributions of \$25,000 or more. Once an account is open, additional contributions of \$10,000 or more can be made at any time. Please note that ACGFund cannot accept tax-exempt securities or securities held for one year or less. Funds may be gifted to ACGFund via the contribution of cash, wire or securities.

Anticipated date that the asset listed below will arrive at ACGFund: \_\_\_\_\_  
[Month / Day / Year]

\_\_\_ Check: \$ \_\_\_\_\_

Please make check payable to the Advisors Charitable Gift Fund and mail with this application to:

ACGFund  
4A Gill Street  
Woburn, MA 01801

\_\_\_ Bank Wire: \$ \_\_\_\_\_

Please mail this application to ACGFund before wiring funds to:

Bank of America  
2 Cummings Park, Woburn, MA 01801  
ABA #011000138  
Account #004601400461  
Beneficiary – ACGFund

\_\_\_ Appreciated Security \_\_\_ Appreciated Mutual Fund *[Please check one]*

Value \$ \_\_\_\_\_  
(Approximate)

ACGFund will contact the financial Adviser with complete instructions on transfer of securities.

Name: \_\_\_\_\_

I.e., EuroPacific Growth Fund, etc.

Symbol: \_\_\_\_\_

I.e., AEPGX, etc.

Shares: \_\_\_\_\_

I.e., 175.543

Purchased: \_\_\_\_\_

I.e., 12/01/93. Please remember that ACGFund cannot receive securities that are tax-exempt or held for one year or less.

*Please duplicate and complete this page for as many securities, wires or checks as are being contributed to fund your Donor Account. Donors and/or financial advisers are requested to send ACGFund the above information prior to the authorization of wires or DTC transfer of securities. All gifts are irrevocable. The value of the gift is established on the Gift Date by ACGFund and is net of any fees. Advisors Charitable Gift Fund is recognized by the Internal Revenue Service as a public charity under IRS Code Section 501(c)(3). Therefore, donations to the fund are irrevocable charitable gifts when made and cannot be returned.*

Advisors Charitable Gift Fund 4A Gill Street Woburn, Massachusetts 01801

**ACGFund**

[www.acgfund.org](http://www.acgfund.org)

877-677-2243

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