

## Contribution Form

The Contribution Form is for current account holders to make additional contributions to their Donor Advised Fund. A Letter of Instruction (LOI) is also required if transferring securities or mutual funds. An LOI is not required if you are transferring cash or physical stock certificates.

## Instructions

- Send a Contribution Form and copy of LOI (if applicable):
  - By Email:** Operations@impactassets.org
  - By Fax:** 301.263.7998
  - By Mail:** ImpactAssets  
c/o Calvert Foundation  
7315 Wisconsin Avenue, Suite 1000W  
Bethesda, MD 20814  
Telephone: 855.482.2946

## Account Information

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**Giving Fund Name**

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**Giving Fund ID**

## Donor Information

Please provide information on each individual making a contribution

**Donor #1**

**Donor #2**

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**Name (First, Middle, Last)**

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**Name (First, Middle, Last)**

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**Mailing Address**

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**Mailing Address**

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**City**

**State**

**Post Code**

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**City**

**State**

**Post Code**

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**Email**

**Phone**

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**Email**

**Phone**

## Contribution Information

### For Cash Contributions

Please provide information on the contribution. The minimum additional contribution amount is \$250 for payments made by check or wire. Please contact a Giving Fund representative at 1.855.482.2946, if you plan to contribute physical share certificates, real estate or other property or non-traditional assets.

\$ \_\_\_\_\_ (Please make check payable to "ImpactAssets")

Check

\$ \_\_\_\_\_

Wire

\_\_\_\_\_ Bank of Origination

**Wire Instructions:** Please contact ImpactAssets at Operations@impactassets.org or 855.482.2946 for wire instructions.

### For Securities or Mutual Fund Contributions

For certain Mutual Fund transfers, you may need to contact Charles Schwab for a B.I.N. Please see the LOI for further directions.

**To ensure your account is properly credited:**

- Complete the **Letter of Instruction (LOI)**.
- Send the **Original LOI** with Medallion Signature Guarantee, if required, to **the firm currently holding the securities**.
- Send a **Copy of the LOI** along with this completed Contribution Form to ImpactAssets before initiating a securities transfer.

\_\_\_\_\_  
**Name & Approximate Value of Transferred Securities**

## Allocation Instructions

Special Investment Instructions (if any) or Notes:

### Signatures

_____	_____	____ / ____ / ____
<b>Donor 1 Signature</b>	<b>Name (Please Print)</b>	<b>Date</b>
_____	_____	____ / ____ / ____
<b>Donor 2 Signature</b>	<b>Name (Please Print)</b>	<b>Date</b>