



Contribution Form

Account Information

Giving Fund Name

Giving Fund ID

Donor Information

Please provide information on each individual making a contribution.

Individual 1

Name (First, Middle, Last)

Mailing Address

City

State

Post Code

- Check \$ _____
- Wire \$ _____
- Securities \$ _____
- Mutual Fund(s) \$ _____

Individual 2

Name (First, Middle, Last)

Mailing Address

City

State

Post Code

- Check \$ _____
- Wire \$ _____
- Securities \$ _____
- Mutual Fund(s) \$ _____

Contribution Information

Please provide information on the contribution. The minimum additional contribution amount is \$250 for payments made by check or wire.¹ 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.

For Cash Contributions

Check \$ _____

(Please make checks payable to ImpactAssets)

Wire: \$ _____

Wire Instructions: Please contact ImpactAssets at Operations@impactassets.org or (855) 482-2946 for wire instructions.

Bank of Origination

¹ ImpactAssets also accepts credit card contributions (minimum of \$10, 3.5% fee)



Contribution Information Continued

For Securities or Mutual Fund Contributions

Instructions:

To ensure your account is properly credited:

- Complete the **Letter of Instruction** (LOI).
- Send the **Original LOI** with Medallion Signature Guarantee **to the firm currently holding the securities**. (The Medallion Signature Guarantee may not be required by all securities firms in order to initiate your transfer. You should contact your particular firm for their requirements. If required, a Medallion Signature Guarantee can be obtained at most financial institutions.)
- Send a **Copy of the LOI** along with this completed application **to ImpactAssets** before initiating a securities transfer.

Name and Values of Transferred Securities

Broker Name

Firm Name

ImpactAssets Brokerage Account Information:

DTC#: 0164, Code 40

Custodian: Charles Schwab & Co, Inc.

Beneficiary Account Name: ImpactAssets Inc.

Beneficiary Account Number: 7835-8108

*Please note that some securities firms may not be able to transfer Mutual Fund holdings directly to the account listed above. If you encounter this situation, please contact an ImpactAssets Associate and we will assist you in facilitating the transfer.

Allocation Instructions

Special Investment Allocation Instructions (if any) or Notes: _____

Signatures

Donor 1 Signature

Name (Please Print)

____/____/____
Date

Donor 2 Signature

Name (Please Print)

____/____/____
Date