

Contribution Form

The Contribution Form is for current account holders to make additional contributions to their ImpactAsset Donor Advised Fund account. 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 Fax:** 301.263.7998
 - By Mail:** ImpactAssets
7315 Wisconsin Avenue, Suite 1000W
Bethesda, MD 20814
Telephone: 855.482.2946

Account Information

Account Name

Account ID

Donor Information

Please provide information on each individual making a contribution

Donor #1

Donor #2

Name (First, Middle, Last)

Name (First, Middle, Last)

Mailing Address

Mailing Address

City

State

Post Code

City

State

Post Code

Email

Phone

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 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

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