



# Intent to give: Letter to an executor to name Vanguard Charitable as beneficiary

Use this form to notify the executor of your will or a designated attorney of your intention to gift a portion of your estate's assets into a philanthropic account. Gifts may be a bequest from your will, IRA, 401(k), or other retirement plan, trust, or insurance policy.

Deferred gifts require planning and careful execution. To ensure your assets are gifted to Vanguard Charitable, we recommend following two steps.

1. When planning your estate, include in writing your intention to gift a portion of your estate's assets to Vanguard Charitable.
2. Alert Vanguard Charitable to your intentions by submitting a copy of this document. To finalize the intended gift upon your death, the estate must initiate the contribution of assets into a new or existing philanthropic account and complete all required paperwork.

**This form is not legally binding and can be amended, changed, or disregarded at any time. Seek the guidance of an advisor when planning your estate or amending estate plans.**

Contact us with questions  
or special requests

888-383-4483  
donorservice@vanguardcharitable.org

## Return information

Retain this document and share with appropriate family members, advisors, and nonprofit organizations. Please also send a copy of this document to Vanguard Charitable.

<b>Email:</b>	donorservice@vanguardcharitable.org <i>We recommend encrypting the form and sharing the password separately.</i>
<b>Fax:</b>	866-485-9414
<b>Mail:</b>	P.O. Box 9509 Warwick, RI 02889-9509

## A letter to the executor of my estate:

I bequeath the amount and/or property and/or percent of my residuary estate described in **Section 2** to Vanguard Charitable (EIN 23-2888152), a nonprofit organization located in Malvern, Pennsylvania.

### 1 Donor information

Identify all current registered owners of the assets to be donated.

Individuals
  Estate of individuals
  Trust or organization

If you selected **Trust or organization**, complete these fields. ▶

Name of trust/organization		
Taxpayer Identification Number		Trust agreement date <i>mm-dd-yyyy</i>

#### Owner/Trustee/Officer A

Gender <input type="checkbox"/> Male <input type="checkbox"/> Female		Name <i>salutation, first, middle initial, last</i>	
Title at organization			
Birth date <i>mm-dd-yyyy</i>	Last 4 digits of SSN or PIN	Preferred phone	
Street address or P.O. box number			
City		State	Zip
Email address			

#### Owner/Trustee/Officer B

Gender <input type="checkbox"/> Male <input type="checkbox"/> Female		Name <i>salutation, first, middle initial, last</i>	
Title at organization			
Birth date <i>mm-dd-yyyy</i>	Last 4 digits of SSN or PIN	Preferred phone	
Street address or P.O. box number			
City		State	Zip
Email address			

## 2 Contribution information

The minimum initial contribution is \$25,000, and the minimum additional contribution is \$5,000.

Check all boxes that apply to the assets you wish to contribute. ►

### Gift type

<input type="checkbox"/>	Bequest under a will or codicil
<input type="checkbox"/>	Distribution from an insurance policy
<input type="checkbox"/>	Distribution from an IRA, 401(k), or other retirement plan Remember to name Vanguard Charitable as the account beneficiary.
<input type="checkbox"/>	Distribution from a trust
<input type="checkbox"/>	Other <i>please specify</i>

Select one option. ►

### Estimated donation

<input type="checkbox"/>	Dollar amount Amount: \$
<input type="checkbox"/>	Percentage of estate Percentage:        % Estimated dollar amount: \$
<input type="checkbox"/>	Description of property or assets

### Custodian/firm

Name of custodian/firm		
Street address or P.O. box number		
City	State	Zip
Preferred phone	Firm account number	
Contact name <i>if available</i>		

### 3 Account information

Choose which account will receive the contributed assets.

<input type="checkbox"/> <b>New account with name</b> Proposed account name: <i>The</i> <span style="float: right;"><i>Fund</i></span>
<input type="checkbox"/> <b>New account without name</b> Advisors will name the account once an initial gift is made.
<input type="checkbox"/> <b>Existing account</b> Account number: Account name: <i>The</i> <span style="float: right;"><i>Fund</i></span>

### 4 Account activity

The more information you include in your plans, the more effectively your executor can implement your requests. Consider detailing the following information. If you require extra space, include additional sheets.

If selected, name account advisors below. ►

<input type="checkbox"/> <b>Nominate a maximum of two account advisors.</b> Advisors have ongoing account privileges and access to recommend grants, select investment options, and revise the succession plan.
<input type="checkbox"/> <b>Recommend an Endowed Grant Plan.</b> Complete and return a <i>Recommend an Endowed Grant Plan</i> form.
<input type="checkbox"/> <b>Select investment options and asset allocation.</b>
<input type="checkbox"/> <b>Suggest granting patterns.</b> For example, recommend grants to a specific favorite charity.

#### Account advisor A

Name <i>salutation, first, middle initial, last</i>		Last 4 digits of SSN or PIN
Birth date <i>mm-dd-yyyy</i>	Relationship to current advisor(s)	
Preferred contact information <i>mail, email, or phone</i>		

#### Account advisor B

Name <i>salutation, first, middle initial, last</i>		Last 4 digits of SSN or PIN
Birth date <i>mm-dd-yyyy</i>	Relationship to current advisor(s)	
Preferred contact information <i>mail, email, or phone</i>		