

2025 Tax Deduction Deadlines for U.S. Charitable Gift Trust®

Please be aware that applications received after December 19th, 2025 will be processed on a best-efforts basis.

CONTRIBUTION TYPE	TIMING	INSTRUCTIONS
Check	Must be postmarked by December 31, 2025	▪ Make payable to U.S. Charitable Gift Trust ▪ Include the donor name, account name or account number in the memo section of the check ▪ Mail to: U.S. Charitable Gift Trust, c/o Ren, 8888 Keystone Crossing, Suite 1200, Indianapolis, IN 46240
Wire	Must be received by December 31, 2025	Please wire to: Wells Fargo Clearing Services, LLC. 420 Montgomery St., San Francisco, CA 94104 Account Name: U.S. Charitable Gift Trust Account Number: 4529914723 ABA Number: 121000248 FBO: Donor Name and DAF Account Number (if known)
Securities/ Mutual Funds	Securities: Must be received into the U.S. Charitable Gift Trust account no later than December 31, 2025 Mutual Funds: Processing times vary on mutual fund transfers and can typically take up to 6 weeks. To ensure that we receive the gift in time, we recommend that you initiate the transfer before November 19, 2025	Deliver all eligible securities/mutual funds to: Wells Fargo Clearing Services, LLC 420 Montgomery St., San Francisco, CA 94104 DTC Number: 0141 Account Name: U.S. Charitable Gift Trust Account Number: 1614-4242 FBO: Donor Name and DAF Account Number (if known)

- **The U.S. Charitable Gift Trust (USCGT)** does not initiate any asset transfers. To facilitate the identification of all incoming assets, please login to your USCGT DAF account and enter a planned contribution. Alternatively, you can submit an Additional Contribution form to USCGT@reninc.com. Please contact us for assistance at 1-800-664-6901 or at USCGT@reninc.com.
- Donors should not wait for an account to be established before initiating the asset transfer. This can be done simultaneously when the transfer is made to a USCGT omnibus account. We match the donor's shares based on the contribution section of the application and a copy of their LOA.

All Gift Trust activities and the participation of Donors in the Gift Trust are subject to the requirements of state and federal law, the terms and conditions of the Gift Trust's Declaration of Trust, the current Donor-Advised Funds' Gifting Booklet (Gifting Booklet) and the completed Donor Contribution Form submitted by each Donor. The Board of Directors of the Gift Trust (Board of Directors) reserves the right to modify the Gift Trust's program at any time, subject to the provisions of the Gift Trust's Declaration of Trust and state and federal law.

Any contribution to the Gift Trust, once accepted by the trustee of the Gift Trust (Trustee), represents an irrevocable commitment. Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Gift Trust, the Trustee and the Board of Directors.

The tax consequences of contributing to the Gift Trust will vary based on individual circumstances. Prospective donors should consult their own

tax advisors. Nothing in this brochure or the Gifting Booklet should be construed as tax advice. Donors to the Gift Trust should be motivated by charitable intent.

The Gift Trust has not been registered under federal securities laws, pursuant to available exemptions.

The Gift Trust is not guaranteed or insured by the United States or any of its agencies or instrumentalities. Contributions are not insured by the Federal Deposit Insurance Corporation and are not deposits or other obligations of, or guaranteed by, any depository institution.

The placement agent, Eaton Vance Distributors, Inc., is a paid solicitor of the Gift Trust, receiving compensation as described in the Gifting Booklet.

NOT FDIC INSURED. OFFER NO BANK GUARANTEE. MAY LOSE VALUE. NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY. NOT A DEPOSIT.

To learn more about U.S. Legacy Income Trusts, please visit www.uscharitablegifttrust.org.