

Contribute to the Fund

AEF accepts a range of assets to create and grow a donor-advised fund. The following at-a-glance instruction guide will help simplify your charitable giving and ensure a seamless contribution to the donor-advised fund.

PREFERRED METHOD

DIRECTLY TO INVESTMENT ACCOUNT

CASH OR STOCK

The financial advisor should work with their custodian to Transfer/Journal stock or cash to the investment account. Please notify AEF of the transfer at **888-440-4233** or **funding@aefonline.org**.

CHECKS

The financial advisor should deposit checks directly to the investment account.

SECONDARY METHOD

TO AEF

CHECKS

Checks should be made payable to:
American Endowment Foundation/
your fund's name and ID

Checks should be mailed to:
American Endowment Foundation,
5700 Darrow Road, Suite 118
Hudson, OH 44236

ACH

Routing# 04 10 00124, Acct# 4244305765
Please indicate the fund's name, fund ID or account number in the memo field.

WIRE TRANSFER

Provide these wire instructions to your financial institution:

PNC Bank, ABA Routing #41000124

For credit to: American Endowment Foundation, Account #4244305765

Notify AEF of the wire amount, name of the wiring institution and the name or ID of your fund at **888-440-4233** or **funding@aefonline.org**.

COMPLEX & RETIREMENT ASSETS

COMPLEX ASSETS

Contact AEF at 888-440-4233 for details about gifting:

- Life insurance
- Limited partnerships
- Closely held stock
- LLC units and real estate

RETIREMENT ASSETS

Ask your IRA, 401(k) or 403(b) administrator for a change of beneficiary form. Fill it out and return it, sending a copy to AEF at **newdaf@aefonline.org**.

BEQUESTS

Contact your attorney to write or amend your will. Be sure to include appropriate bequest language, which you can find at **aefonline.org/bequests**. Notify AEF to expect the gift by contacting **888-440-4233** or **funding@aefonline.org**.