

Gifts to Your Fund

This page is included to describe what kind of assets can be gifted into your AEF Donor Advised Fund and how to do so. If you have questions, please call us at 888-440-4233.

Type of Gift	Instructions
Checks	Make check payable to: American Endowment Foundation / <i>your Fund's name</i> . Mail to: American Endowment Foundation P.O. Box 911 Hudson, OH 44236-5911
Wire transfer of cash	Provide these wire instructions to your financial institution: <i>Mellon Bank, Pittsburgh, PA</i> <i>ABA Routing #043000261</i> <i>For credit to Merrill Lynch Service Center Account No. 101-1730</i> <i>Further credit to American Endowment Foundation, Account #61B-04090</i> Notify AEF to expect wire transfer. In order process properly, AEF will need to know the wire amount, name of the wiring institution, and name of your Donor Advised Fund.
Stock or Mutual Funds – electronic transfer	If transfer is to an existing investment account that is linked to your Donor Advised Fund, send letter of instruction to your financial advisor. This letter may need to be signature guaranteed. Notify AEF to expect transfer.
Stock – physical certificates	Contact AEF for details.
Life insurance policies	Contact agent or insurance company for procedure. AEF should be listed as sole owner and beneficiary of policy. Notify AEF to expect gift.
Closely-held stock, limited partnerships, or LLC units	Contact AEF for details.
Real estate	Contact AEF for details.
Retirement assets	Ask your IRA, 401k or 403B administrator for a change of beneficiary form. Fill out and return, sending a copy to AEF.
Bequest	Contact your attorney to write or amend your will.