

## Deadlines to Receive a 2024 Tax Deduction for Contributions to U.S. Legacy Income Trusts®

Contribution Type	Timing	Instructions
Check	Must be postmarked by December 31, 2024	<ul style="list-style-type: none"> <li>• Make payable to U.S. Charitable Gift Trust/ FFC: U.S. Legacy Income Trust</li> <li>• Include the donor name, account name or account number in the memo section of the check</li> <li>• Mail to: U.S. Charitable Gift Trust, c/o Ren, 8888 Keystone Crossing, Suite 1200, Indianapolis, IN 46240</li> </ul>
Wire	Must be received by December 31, 2024	<p>Please wire to:</p> <p>Bank Name: Wells Fargo Clearing Services, LLC. Bank Address: 420 Montgomery St., San Francisco, CA 94104 Account Name: U.S. Charitable Gift Trust Account Number: 4483394-078 ABA #: 121000248 FBO: Donor Name and U.S. Legacy Income Trust Account Number (if known)</p>
Securities/Mutual Funds	<p>Securities/Mutual Funds: Must be received into the U.S. Charitable Gift Trust account no later than December 31, 2024.</p> <p>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, 2024.</p>	<p>Deliver all eligible securities/mutual funds to:</p> <p>Bank Name: Wells Fargo Clearing Services, LLC Bank Address: 420 Montgomery St., San Francisco, CA 94104 DTC Number: 0141 Account Name: U.S. Charitable Gift Trust Account Number: 4457-7281 FFC: U.S. Legacy Income Trust FBO: Donor Name and U.S. Legacy Income Trust Account Number (if known)</p>

**The U.S. Legacy Income Trusts do not initiate any asset transfers.** To facilitate the identification of all incoming assets, please login to your U.S. Legacy Income Trust account and enter a planned contribution. Alternatively, you can submit an Additional Contribution Form to [uslit@reninc.com](mailto:uslit@reninc.com). Please contact us for assistance at 1-800-664-6901 or at [uslit@reninc.com](mailto:uslit@reninc.com).

All Trust activities and the participation of Donors and income beneficiaries in the Trusts are subject to the requirements of state and federal law, the terms and conditions of the Trusts' Declarations of Trust, the Trusts' current Information Statement (Information Statement) and the completed Donor Contribution Forms submitted by each Donor. The Board of Directors (Board of Directors) of the U.S. Charitable Gift Trust (Gift Trust) reserves the right to modify the Trusts' program at any time, subject to the provisions of the Trusts' Declarations of Trust and state and federal law. Any contribution to a Trust, once accepted by the trustee of the Trusts (Trustee), represents an irrevocable commitment. Contributions cannot be rescinded or changed, and are subject to the exclusive legal control of the Trust, the Trustee and the Board of Directors. Donors to the Trusts should be motivated by charitable intent. As charitable giving vehicles, the Trusts should not be treated as, and are not designed to compete with, investments made for private gain. An intention to benefit the Gift Trust and one or more qualified charitable organizations eligible for support by the Gift Trust should be a significant part of the decision to contribute to a Trust. The tax consequences of contributing to a Trust will vary based on individual circumstances. Prospective Donors should consult their own tax advisors. Nothing in this brochure or the Information Statement should be construed as tax advice. Distributions to income beneficiaries are not guaranteed by any party, and are subject to investment risk. In considering potential changes in annual distribution rates, the Trustee will assess the Trusts' long-term earnings potential and seek to balance the interests of current and future income beneficiaries and the charitable remainder interests.

Neither the Trusts nor the Gift Trust has been registered under federal securities laws, pursuant to available exemptions.

Neither the Trusts nor the Gift Trust is 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 certain Trusts and the Gift Trust, receiving compensation as described in the Information Statement and in the Donor-Advised Funds' Gifting Booklet.

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