# How to Make a Contribution to Your Fund

## Preferred Method – to the Investment Account

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash/Stock in INV account</td>
<td>The Financial Advisor will need to work with their custodian to Transfer/Journal stock or cash to the Investment Account. Please Notify AEF of the transfer by phone call at 888-440-4233 or email to: <a href="mailto:funding@aefonline.org">funding@aefonline.org</a>. Notify AEF prior to the transfer of assets with gift details by phone call or email.</td>
</tr>
<tr>
<td>Checks</td>
<td>The Financial Advisor will deposit checks directly to the Investment Account.</td>
</tr>
</tbody>
</table>

## Secondary Option – to AEF

### Checks

Make check payable to: American Endowment Foundation FBO Fund Name and Fund ID
Mail to:
American Endowment Foundation
5700 Darrow Rd., Suite 118
Hudson, OH 44236

### ACH or Wire Transfer

Routing# 04 10 00124
Acct# 4244305765
Please indicate the Fund ID, name or account # in the memo field.

Provide these wire instructions to your financial institution:
PNC Bank
ABA Routing #041000124
For Credit to: American Endowment Foundation, Account #4244305765
Notify AEF to expect wire transfer. In order to process properly, AEF will need to know the wire amount, name of the wiring institution, and name of your Donor Advised Fund.

## Complex and Retirement Assets

### Complex Assets

Contact AEF at 888-440-4233 for details
- Life insurance
- Closely-Held Stock
- Limited partnerships
- LLC units and Real Estate

### Retirement Assets

Ask your IRA, 401k or 403B administrator for a change of beneficiary form. Fill out and return, send a copy to AEF at newdaf@aefonline.org

### Bequest

Contact your attorney to write or amend your will. Notify AEF to expect gift.