



# ABE Charitable Legacy Fund Donation Form

This form is the initial step to make a direct donation to the ABE Charitable Legacy Fund.

## Donor Information

Donor Name _____		
Social Security Number _____	Date of Birth (mm/dd/yyyy) _____	
Address _____		
City _____	State _____	Zip Code _____
Home Phone _____	Business Phone (optional) _____	
E-mail Address _____		

Please list additional Donors on a separate piece of paper providing the same information as requested above.

## Donation Information

I want this donation to be:

Unrestricted     Restricted (such as for research or indigent legal representation)

Briefly outline how you want this gift to be restricted:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Signature

Donor \_\_\_\_\_ Date \_\_\_\_\_

# Donations to the ABE Charitable Legacy Fund

## Please Check Type of Donation(s)

- Cash
- Securities (stocks, bonds, mutual funds)
- Grant from other donor-advised fund program or private foundation (please identify on next page)

Please fill in the information below and on the other side of this form depending on the type of donation.

## Cash Donations

Please provide the following information so the donation can be identified when the transfer is complete.

(Dollar Amount) \$ \_\_\_\_\_ Financial Institution (where cash is held) \_\_\_\_\_

Please check one and follow transfer instructions:

- Check — make out and mail to to the American Bar Endowment, 321 North Clark Street, Chicago, IL 60610
- Wire Transfer — to: The Northern Trust Company, ABA #071000152, ATTN: Master Trust Cash Processing, ACCT #5186061000,  
REF: Acct #22-07200, NAME: American Bar Endowment

Please see reverse side for additional donation instructions.



# ABE Charitable Legacy Fund Donation Form

## Security Donations

Please provide the following information so the donation can be identified.

1. Name of Security	Financial Institution (where securities are held)	No. of Shares or Units	Approx. Value
2. Name of Security	Financial Institution (where securities are held)	No. of Shares or Units	Approx. Value
3. Name of Security	Financial Institution (where securities are held)	No. of Shares or Units	Approx. Value
4. Name of Security	Financial Institution (where securities are held)	No. of Shares or Units	Approx. Value

Please check all that apply, indicate item number above, and follow transfer instructions:

- Mutual funds (Item(s) # \_\_\_\_\_) — call ABE at 1-800-621-8981, extension 6408
- Security with restrictions (Item(s) # \_\_\_\_\_) — call ABE at 1-800-621-8981, extension 6408
- Security is unrestricted and DTC eligible (Item(s) # \_\_\_\_\_) — wire to: The Northern Trust Company, DTC #2669, Acct Name: American Bar Endowment Gift Processing Account, Account Number: 26-29835
- Security is unrestricted and held as physical certificates (Item(s) # \_\_\_\_\_) — send certificates and stock power to: The Northern Trust Company, DTC #2669, Acct Name: American Bar Endowment Gift Processing Account, Account Number: 26-29835
- Bonds — Fed Book Entry (Item(s) # \_\_\_\_\_) — wire to: The Northern Trust Company, DTC #2669, Acct Name: American Bar Endowment Gift Processing Account, Account Number: 26-29835
- Bonds — Book Entry GNMA Deliveries (Item(s) # \_\_\_\_\_) — wire to: The Northern Trust Company, DTC #2669, Acct Name: American Bar Endowment Gift Processing Account, Account Number: 26-29835

## Grants or Donations From Other Charitable Organizations

(Dollar Amount) \$ \_\_\_\_\_ Name of Charitable Organization \_\_\_\_\_

## Critical Calendar Year Tax Dates

- Initiate restricted securities and mutual fund transfers by December 1.
- ABE must receive all wires on or before December 31.
- U.S. mail must be post marked on or before December 31.
- FedEx must arrive at ABE on or before December 31.
- Transfer of a grant from another charitable organization depends on grant distribution requirements for the particular organization.

## Next Steps

1. Fax, mail, or FedEx this signed form to: **American Bar Endowment,**  
321 North Clark Street, Chicago, IL 60610-5209  
(phone) 1-800-621-8981 (fax) 1-312-988-6401
2. A receipt of the donation will be mailed to the Donor listed on this form.



AMERICAN BAR ENDOWMENT  
*Insuring your life's needs. Advancing your life's work.*

**321 North Clark Street  
Chicago, IL 60610-5209**

**CGF@abendowment.org  
• 1-800-621-8981 •**

**<http://www.abendowment.org>**