

# Additional Contribution Agreement

## Instructions

Please print clearly in all CAPITAL LETTERS and use black ink to fill out this agreement. For assistance, contact the Child Welfare League of America (CWLA). Return this completed, signed agreement along with an Asset Transfer Request Form (if transferring assets from outside a Salomon Smith Barney account) or a Letter of Authorization to Transfer Assets (if transferring assets from a Salomon Smith Barney account) to CWLA. Before completing this document, please:

1. Read the Child Welfare League of America Charitable Investment Fund Donor Circular and Disclosure Statement ("Donor Circular"). The Donor Circular includes important information on your **irrevocable, nonrefundable** contribution and features of the program.
2. Evaluate your philanthropic goals.
3. Discuss with CWLA how a donor-advised fund can help you meet your charitable giving needs.
4. Consult your tax and/or legal advisor before contributing additional assets.

### Please note:

- Your charitable income tax deduction receipt and Form 8283 will *not* be sent to you and a deduction will *not* be available to you until transferred assets have been received by the Salomon Smith Barney Charitable Trust, Inc., and are in your Child Welfare League of America Charitable Investment Fund account.
- The minimum value of additional contributions must be at least \$5,000 and each individual asset contributed must have an estimated fair market value of at least \$5,000.
- Market conditions may affect your actual contributed amount.

## A. Account Information

### 1. Account Information

Donor Account Number  
(optional)

Donor Account Name

### 2. Donor Information

**Primary Donor** Last Name First Name Middle Initial  Mr.  Mrs.  Ms.  
Social Security Number Date of Birth Month Day Year

**Donor 2** Last Name First Name Middle Initial  Mr.  Mrs.  Ms.  
Social Security Number Date of Birth Month Day Year

### 3. Trust, Corporation, or Other Entity

Taxpayer ID Number Trust/Incorporation Date

Trust Name

Full Name of  
Corporation/Business Entity

Trustee/Authorized Signor  
Name, Position at Firm

## B. Gift Information

The value of additional contributions must be at least \$5,000. Please contact CWLA for assistance. Market conditions may affect your actual contributed amount.

### 1. Cash

Dollar Amount \$

Mark one box below to indicate how you will contribute cash.

**WIRE** funds

To wire funds to SSBCT:  
ABA: 021 000 021  
Chase Manhattan Bank  
New York, NY 10021  
Account: 066-198038—Salomon Smith Barney  
FFC: Smith Barney Charitable Investment Fund  
Account: 168-30342-1-7

**Make checks payable to Salomon Smith Barney Charitable Trust, Inc., and mail to:**

Salomon Smith Barney Charitable Trust, Inc.  
388 Greenwich Street  
17th Floor  
New York, NY 10013  
Attn: John Bacon

**B. Gift Information (continued)****2.  Securities Held in a Salomon Smith Barney Account****Name of Security 1**

CUSIP (required)

Number of Shares / Bonds / Mutual Funds

SSB Account Number

Approximate Value

**Name of Security 2**

CUSIP (required)

Number of Shares / Bonds / Mutual Funds

SSB Account Number

Approximate Value

**3.  Securities Held in a Non-Salomon Smith Barney Account**

Please complete the Asset Transfer Request Form for donating securities from non-Salomon Smith Barney accounts. Market conditions may affect your actual contributed amount.

**Name of Security 1**

CUSIP (required)

Number of Shares / Bonds / Mutual Funds

Account Number

Approximate Value

Financial Services Company Name

**Name of Security 2**

CUSIP (required)

Number of Shares / Bonds / Mutual Funds

Account Number

Approximate Value

Financial Services Company Name

**4.  Donation from Another Charitable Vehicle (e.g., Private Family Foundation or Other Donor-Advised Fund)**

Please complete this section if you are interested in making an IMMEDIATE transfer. Consult CWLA if you wish to make a FUTURE contribution from a charitable vehicle.

Name of Charitable Vehicle

Dollar Amount

Description

**To wire funds to SSBCT:**

ABA: 021 000 021  
 Chase Manhattan Bank  
 New York, NY 10021  
 Account: 066-198038 —Salomon Smith Barney  
 FFC: Smith Barney Charitable Investment Fund  
 Account: 168-30342-1-7

**Make checks payable to Salomon Smith Barney Charitable Trust, Inc., and mail to:**

Salomon Smith Barney Charitable Trust, Inc.  
 388 Greenwich Street  
 17th Floor  
 New York, NY 10013  
 Attn: John Bacon

### C. Recommend an Asset Allocation

Please recommend an asset allocation for your donor account. More complete information on the allocation pools may be found in the Donor Circular. Please note that the percentage(s) inserted below must add up to 100%.

1. \_\_\_\_\_% GROWTH (80% equities, 20% fixed income)
2. \_\_\_\_\_% BALANCED (50% equities, 50% fixed income)
3. \_\_\_\_\_% CONSERVATIVE (20% equities, 80% fixed income)

If you do not recommend an asset allocation, the Salomon Smith Barney Charitable Trust, Inc. will invest your contribution as follows: 100% BALANCED (50% equities, 50% fixed income)

### D. Acknowledgment of Terms

The Child Welfare League of America Charitable Investment Fund is a program offered in conjunction with the Salomon Smith Barney Charitable Trust, Inc., a 501(c)(3) charitable organization under the Internal Revenue Code of 1986, as amended. By signing this form, I authorize the Salomon Smith Barney Charitable Trust, Inc., to receive the additional contribution(s) to my account named in this agreement, the administration of which is governed by an existing Donor Contribution Agreement. **I have received the Donor Circular and I understand that I am responsible for reading it. I agree to be legally bound by the Donor Circular's terms and conditions, as currently in effect and as amended from time to time, and the terms and conditions set forth in all related forms.**

I understand that any contributions I make to the Child Welfare League of America Charitable Investment Fund are irrevocable and are nonrefundable to me for any reason. I realize that any dividend interest and capital gains generated from my account belong to the Salomon Smith Barney Charitable Trust, Inc. Therefore, I cannot and will not claim that income as additional tax deductions. Once my contributions have been accepted, they are the property of the Salomon Smith Barney Charitable Trust, Inc. governed by an independent Board of Directors. I understand that the Fund investments could sustain a loss which would lead to there being less money to donate than I originally contributed. **I am aware that any recommendations I suggest will be considered but are subject to approval by the Board of Directors concerning the investment selections, grants, and award to any charitable organization.**

I understand that the pools of managed mutual funds may lose money.

I understand that market conditions may affect my actual contributed amount.

To the best of my knowledge, all information enclosed is accurate and I will immediately notify CWLA if any changes occur. My signature below constitutes my agreement and acceptance of all terms, conditions, and features selected in all parts of this application, and in all additional forms. SIGNATURES ARE REQUIRED FROM ALL DONORS ON THE ACCOUNT.

### E. Mandatory Initial Grant (required)

Origin of Contribution (check one):

- contribution made directly through the Child Welfare League of America.
- contribution made through a member agency of the Child Welfare League of America. If so, please write in name and location of member agency.

\_\_\_\_\_  
Name of member agency

\_\_\_\_\_  
City, State

I agree to make a grant(s) to the entity(ies) name above as follows:

1. if contribution is made directly through the Child Welfare League of America, I agree to grant 15% of the contributed amount to the Child Welfare League of America.
2. if contribution is made through a member agency of the Child Welfare League of America, I agree to grant 20% of the contributed amount as follows: 10% to the Child Welfare League of America and 10% to the named CWLA member agency.

Donor Signature

Date

Donor Signature

Date

Once this form is completed, please fax it to CWLA at 703/412-2401.

CWLA AND SALOMON SMITH BARNEY DO NOT PROVIDE TAX OR LEGAL ADVICE. PLEASE CONSULT YOUR TAX AND/OR LEGAL ADVISOR FOR SUCH GUIDANCE.