

U.S. Department of the Treasury
Trump Accounts Qualified Class Contribution Application

INSTRUCTIONS

With this Application, a Qualified Donor requests to make a Contribution to Treasury for purposes of funding a Qualified General Contribution to Trump Account beneficiaries in a Qualified Class.

As used in this document:

- “Application” means this application that a Qualified Donor submits to Treasury.
- “Code” means the Internal Revenue Code of 1986, as amended, and the guidance and regulations issued thereunder.
- “Contribution” means a general funding contribution under Section 530A(f)(2) of the Code that is made pursuant to this Application.
- “Growth Period” is the period that ends before January 1 of the calendar year in which an account beneficiary attains age 18 (i.e. before the year the beneficiary turns 18)
- “Measurement Date” means the date on which membership in a Qualified Class is determined for the purpose of distributing a Contribution.
- “Qualified Class” means one of the following: a “Nationwide Class” (America 250 Fund), a “Birth-Year Class,” a “State Class,” or a “Qualified Geographic Area Class.” These classes are described in more detail below.
- “Qualified Donor” means a section 501(c)(3) tax-exempt organization, a state (or political subdivision of a state), the District of Columbia, or an Indian tribal government. A Qualified Donor cannot be an individual, family, or any U.S. territory.
- “Qualified General Contribution” means a beneficiary’s share of a general funding contribution distributed by Treasury under Section 530A(f)(1) of the Code.
- “Treasury” means the U.S. Department of the Treasury or its financial agent.
- “Trump Account” means a type of individual retirement account as described in Section 530A of the Code.

This Application should not be used if a Qualified Donor wants to make an application where the qualified class consists of all Trump Account beneficiaries who reside in a Qualified Geographic Area as described in Section 530A(f)(3)(B). A Qualified Donor should contact [REDACTED] for more information about how to make this type of contribution.

Payment to Treasury

All contributions must be transferred electronically from a U.S. financial institution using ACH or wire transfer instructions provided by Treasury.

Distribution to Trump Account Beneficiaries

A Contribution under this Application will be distributed, in equal shares, to the Trump Accounts of beneficiaries who are in the Growth Period, members of a Qualified Class selected by the Qualified Donor. After receiving and processing the Contribution, Treasury will make the

Qualified General Contributions to Trump Accounts of eligible account beneficiaries as soon as practicable after the Measurement Date.

Nationwide Class

A Nationwide Class consists of all Trump Account beneficiaries who, as of the Measurement Date, have a Trump Account and are in the Growth Period. A Qualified Donor may fund a contribution to a Nationwide Class in any amount, and such contributions will be aggregated with all other contributions to the Nationwide Class. It is anticipated that the total amount of contributions in the Nationwide Class will be contributed in a one-time payment to the Trump Accounts of beneficiaries who, as of the Measurement Date, are in the Nationwide Class.

Birth-Year Class

A Birth-Year Class consists of all Trump Account beneficiaries who, as of the Measurement Date, have a Trump Account, are in the Growth Period, and were born in one or more calendar years specified by the Qualified Donor. The Qualified Donor who wants to fund contributions to a Birth-Year Class will need to select one or more calendar years in this application. A Qualified Donor may fund a contribution to a Birth-Year Class in any amount, and such contributions will be aggregated with all other contributions to a Birth-Year Class for the same year. It is anticipated that the total amount of contributions to a Birth-Year Class will be contributed in a one-time payment to the Trump Accounts of beneficiaries who, as of the Measurement Date, are in the Birth-Year Class.

State Class

The State Class consists of all Trump Account beneficiaries who, as of the Measurement Date, have a Trump Account, are in the Growth Period, and are residents of one or more states selected by the donor. Treasury will determine the residency of the account beneficiary based on information provided on behalf of the account beneficiary by the Trump Account trustee or custodian. The Qualified Donor who wants to fund contributions to a State Class will need to select one or more states (including the District of Columbia) in this application. A qualified donor may fund a contribution to a State Class in any amount, and such contributions will be aggregated with all other contributions to a State Class for the same state. It is anticipated that the total amount of contributions to a State Class will be contributed in a one-time payment to the Trump Accounts of account beneficiaries who, as of the Measurement Date, are in the State Class.

SECTION 1 – QUALIFIED DONOR INFORMATION

Entity Information

Name: _____

Address: _____

Employer Identification Number or Tax ID Number: _____

Entity Type:

- 501(c)(3) Tax-exempt organization
- State or District of Columbia
- Political subdivision of a State (ex: city or county government)
- Indian Tribal Government

Authorized Representative:

Name and Title: _____

Address: _____

E-mail: _____

Phone: _____

SECTION 2 – CONTRIBUTION DETAILS

Proposed Contribution Amount: \$ _____

Qualified Class Type (select ONLY one):

- Nationwide Class (America 250 Fund)
- Birth-Year Class
If selected, list the applicable calendar year(s): _____
- State Class
If selected, list the applicable state(s):

SECTION 3 – PUBLIC COMMUNICATIONS

I authorize / do NOT authorize Treasury to publicly recognize this contribution.

If authorized, provide requested recognition name: _____

SECTION 4 – REPRESENTATIONS

By submitting this Application and signing below, I, on behalf of the Qualified Donor, acknowledge and agree that:

- (a). All information provided in this Application is accurate and complete.
- (b). The entity listed in this Application is a Qualified Donor.
- (c). Submission of this Application does not constitute acceptance by Treasury of any contribution or the formation of a binding agreement.

- (d). I have reviewed the [Trump Accounts Qualified Class Contribution Agreement](#). A final agreement will be executed by both parties after Treasury receives and reviews this Application.

* * * * *

By signing below, I certify under penalties of perjury that I am an authorized representative of the entity identified as the Qualified Donor above, with the authority to make these representations and this contribution on behalf of the Qualified Donor.

Authorized Representative Name

Signature

Title

Date