

Please complete all information in this application form to open a charity fund with The Signatry. Print in ink or type. If you need assistance, you may contact your financial advisor or call **913-310-0279**. After the fund is open, please visit our website at [thesignatry.com](http://thesignatry.com) to give to the fund.

**Return completed forms to:**

**The Signatry**  
7171 W 95th Street, Suite 501  
Overland Park, KS 66212

Fax: **913-227-0254**

Email: [info@thesignatry.com](mailto:info@thesignatry.com)

**DESIGNATED FUND INFORMATION**

A designated fund with The Signatry is used for designating gifts to a single ministry or charity. To learn more about a designated fund, visit [thesignatry.com](http://thesignatry.com).

Most designated funds are named after the organization (i.e. "The First Baptist Church Designated Fund"). Unless you choose to remain anonymous, the name of your fund will be used in correspondence to the charitable organization that receives grants from the fund.

Fund name	
-----------	--

**CHARITY INFORMATION\***

Charity name			
Street address			
City/State/Zip			
Phone		Email address	
Tax ID/EIN		Web address	

*\* Charity must be recognized and qualified as a tax-exempt organization and a public charity or private operating foundation under Sections 501(c)(3) and 509(a) of the Internal Revenue Code, contributions to which are tax deductible under Sections 170(c) and 170(b)(1)(A) of the Code. If the charity ceases to qualify to receive grants under The Signatry User Agreement (available online at [thesignatry.com/agreement](http://thesignatry.com/agreement)). The Signatry may distribute assets in the designated fund to another entity at its discretion.*

**DONOR INFORMATION**

**DONOR OF RECORD\***

Mr.    Mrs.    Ms.

Full name		Date of birth	
Street address			
City/State/Zip			
Home phone		Business phone	
Email address			

**ADDITIONAL DONOR\***

Mr.    Mrs.    Ms.

Full name		Date of birth	
Street address			
City/State/Zip			
Home phone		Business phone	
Email address			

*\* Reports will be mailed to the Donor of Record only.*

**■ ADDING AN ADDITIONAL ADVISOR (if applicable)**

If you wish for your professional advisor to be able to access your fund, please fill out the information below. (To have a financial advisor also manage your fund's investments, please fill out "Investment Option 2: Investment Manager" below.) If you do not wish to give a professional advisor access, you can leave this section blank.

Additional Advisor:    Accountant    Attorney    Financial Advisor    Other:

Advisor's name and title		Firm name	
Street address			
City/State/Zip			
Phone		Email	

I authorize my advisor to access my Fund:

- Complete – full access to managing fund.
- Limited – can recommend grants and change investment pools but cannot remove donors.
- Read/review only – may be informed of fund activity but cannot recommend grants or changes to the fund.

**■ HOW DID YOU FIRST HEAR ABOUT THE SIGNATRY?**

<input type="checkbox"/> Advisor:	
<input type="checkbox"/> Donor:	
<input type="checkbox"/> Church/Ministry:	
<input type="checkbox"/> Online/Print:	
<input type="checkbox"/> Staff/Board Member:	

**INVESTMENT OPTIONS**

A donor advised fund with The Signatry can be separately managed by a financial advisor of your choice, or it can be invested in The Signatry's biblically responsible investment pools.

**INVESTMENT OPTION 1: INVESTMENT POOLS**

If you choose to have the donor advised fund invested with The Signatry's biblically responsible investment pools, please indicate below what percentage of your fund you would like invested in each pool:

- \_\_\_\_\_ % **Money Market**—100% fixed income, low risk
- \_\_\_\_\_ % **Capital Preservation Model**—5% equity, recommended for holding less than 2 years, low risk
- \_\_\_\_\_ % **Conservative Income**—25% equity, recommended 1-3 years holding, low risk
- \_\_\_\_\_ % **Income & Growth Model**—50% equity, recommended 2-5 years holding, moderately aggressive
- \_\_\_\_\_ % **Growth Model**—70% equity, recommended 5+ years holding, aggressive
- \_\_\_\_\_ % **Aggressive Growth Model**—95% equity, recommended 10+ years holding, very aggressive

**100 % Total**

*(For more information on The Signatry's investment pools, please visit [thesignatry.com/investmentpools](http://thesignatry.com/investmentpools))*

**INVESTMENT OPTION 2: INVESTMENT MANAGER**

If you would like to have your fund managed by a financial advisor, please recommend in the space below an investment manager for your fund; however, remember that final selection is made by The Signatry. All managers retained by The Signatry must adhere to The Signatry's investment policies. If you do not recommend a manager, The Signatry will invest your fund in their biblically responsible investment pools.

Company			
Advisor name			
Street address			
City/State/Zip			
Phone number		Fax number	
Email address			

**SUCCESSOR INFORMATION**

Please list an individual that will be your successor grant advisor to the fund. In the event of your death or incapacity, or the termination of your organization, this person will be able to recommend timing of grants sent to the charity.

Successors may be appointed or changed at any time by submitting a Fund Information Change Form.

**AS DONOR OF RECORD, I HEREBY NAME THE FOLLOWING PERSON AS MY SUCCESSOR:**

Full name	
Street address	
City/State/Zip	
Home phone	
Email address	
Date of birth	
Relation	

**ACKNOWLEDGMENT**

By signing below: (1) I, the undersigned donor, understand that all gifts to this fund are irrevocable and nonrefundable gifts to The Signatry for charitable purposes; (2) I acknowledge that I have read and agree to this Application and The Signatry User Agreement (which includes details regarding the terms used in this Application, the parties' roles and responsibilities, limitations of liability, an arbitration clause (including a class action waiver), indemnification of The Signatry, and other terms and conditions) which are available on The Signatry's website (at [thesignatry.com/agreement](http://thesignatry.com/agreement)) or upon request; (3) I certify that, to the best of my knowledge, all information I have provided is accurate and I will notify The Signatry promptly of any changes; and (4) I also understand that my capacity as a Donor is advisory in nature and that The Signatry has the sole and exclusive authority and discretion to invest and disburse the property transferred.

Signature		Date	
Printed Name of Donor			
Signature		Date	
Printed Name of Donor			