

Please use this form to submit changes to your Fund. If you need assistance, call **913-310-0279**.

Return completed forms to:

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

Fax: **913-227-0254**

Email: **info@thesignatry.com**

FUND INFORMATION

Fund name	
Fund number	

CHANGING FUND NAME

New fund name	
---------------	--

ADDING OR REMOVING A PERSON ON THE FUND:

I would like to...

- Add** (Allow access to fund information, including current and historical data and transactions regarding the fund)
- Remove** (Terminate all access & rights to fund)

Full name			
Company (if applicable)			
Street address			
City/State/Zip			
Home phone		Business phone	
Email address			

Role (if adding)

- Donor/Grant Advisor – full access to managing fund.
- Financial Advisor – access to review contributions, adjust investment options and recommend grants.
- Interested Party – review access only. (Donors often add their accountant or other professional advisors to this role.)

Fund Name: _____ Fund Number: _____

ADDITIONAL PERSON

I would like to...

- Add** (Allow access to fund information, including current and historical data and transactions regarding the fund)
- Remove** (Terminate all access & rights to fund)

Full name			
Company (if applicable)			
Street address			
City/State/Zip			
Home phone		Business phone	
Email address			

Role (if adding)

- Donor/Grant Advisor – full access to managing fund.
- Financial Advisor – access to review contributions, adjust investment options and recommend grants.
- Interested Party – review access only. (Donors often add their accountant or other professional advisors to this role.)

■ ADDING SUCCESSORS TO THE FUND:

In the event of your death or incapacity, or the termination of your organization, The Signatry wishes to still carry out your goals regarding the fund. A succession plan allows us to continue your legacy. You may designate 1) organizations to receive your grants from your fund or 2) successor advisor(s) to continue advising the fund in your absence. **On the following page, please fill out either Option 1 or Option 2.**

These are the two most common choices for fund succession, but beyond these options, you may tailor the fund's legacy for your individual wishes. To create a more in-depth plan, contact The Signatry at info@thesignatry.com or call 913-310-0279.

Fund Name: _____ Fund Number: _____

OPTION 1: LEAVING YOUR FUND TO CHARITIES

Name of organization		Name of organization	
Street address		Street address	
City/State/Zip		City/State/Zip	
Home phone		Home phone	
Business phone		Business phone	
Email address		Email address	
% of fund to be granted to the organization		% of fund to be granted to the organization	

OPTION 2: NAMING SUCCESSOR ADVISORS TO CONTINUE ADVISING YOUR FUND

Primary successor		Secondary successor	
Full name		Full name	
Street address		Street address	
City/State/Zip		City/State/Zip	
Home phone		Home phone	
Business phone		Business phone	
Email address		Email address	
Date of birth		Date of birth	
Relation		Relation	

For each successor advisor listed, I would like to do the following:

- Split the fund into new donor advised funds for each successor
 - _____ % to be placed in primary successor's fund
 - _____ % to be placed in secondary successor's fund

- Keep the fund as one donor advised fund with a single/multiple successor(s)

To create a more in-depth succession plan, contact The Signatry at info@thesignatry.com or call 913-310-0279.

Fund Name: _____ Fund Number: _____

CHANGING INVESTMENT POOLS:

A donor advised fund with The Signatry can be separately managed by a financial advisor of your choice (subject to approval by The Signatry), or it can be invested in The Signatry’s biblically responsible 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:

INVESTMENT POOLS

- _____ % **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**

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 Form 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) 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			