

## Instructions

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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:

**Mail or Overnight Delivery:**

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

**Fax:**

913-227-0254

**Email:**

donorcare@thesignatry.com

## Charity Fund Information

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

Most charity funds are named after the organization (i.e. "The First Baptist Church Charity 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

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## Charity Information

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Charity Name

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Tax ID/EIN

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Web Address

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Mailing Address

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Street

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City

State

Zip

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Phone

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Email Address

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\* 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 charity fund to another entity at its discretion.

## Charity Representative Information

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### Charity Representative\*

Mr.  Mrs.  Ms.

Full Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Street

City

State

Zip

Primary Phone  Home  Cell  Business \_\_\_\_\_

Email Address \_\_\_\_\_

### Additional Charity Representative\*

Mr.  Mrs.  Ms.

Full Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Street

City

State

Zip

Primary Phone  Home  Cell  Business \_\_\_\_\_

Email Address \_\_\_\_\_

\* Reports will be mailed to the Charity Representative only.

## Adding an Additional Advisor (if Applicable)

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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 \_\_\_\_\_

Address \_\_\_\_\_

Street

City

State

Zip

Phone \_\_\_\_\_

Email Address \_\_\_\_\_

### I authorize my advisor to access my Fund:

- Complete**—full access to managing fund.
- Read/review only**—may be informed of fund activity but cannot recommend grants or make changes to the fund.

**How Did You First Hear About The Signatry?**

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- Advisor: \_\_\_\_\_
- Donor: \_\_\_\_\_
- Church/Ministry: \_\_\_\_\_
- Online/Print: \_\_\_\_\_
- Staff/Board Member: \_\_\_\_\_

**Investment Options**

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A charity 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 (at [thesignatry.com/donor-advised-fund/investment-pools/](https://thesignatry.com/donor-advised-fund/investment-pools/)).

**Investment Option 1: Investment Pools**

If you choose to have the charity 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 holdings
- \_\_\_\_\_ % **Capital Preservation Model**—5% equity holdings
- \_\_\_\_\_ % **Conservative Income**—25% equity holdings
- \_\_\_\_\_ % **Income & Growth Model**—50% equity holdings
- \_\_\_\_\_ % **Growth Model**—70% equity holdings
- \_\_\_\_\_ % **Aggressive Growth Model**—95% equity holdings
- \_\_\_\_\_ % **Domestic Index Pool**—95% equity holdings
  
- 100% Total**

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

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**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 \_\_\_\_\_

Address \_\_\_\_\_

Street

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email Address \_\_\_\_\_

**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.

Authorized Signer for Charity \_\_\_\_\_

Printed Name of Signer for Charity \_\_\_\_\_ Date \_\_\_\_\_

Authorized Signer for Charity \_\_\_\_\_

Printed Name of Signer for Charity \_\_\_\_\_ Date \_\_\_\_\_