

Instructions

Please complete all information in this application form to open a donor advised 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 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

Donor Advised Fund Information

Your fund can be named after you or your family, or it can reflect an area of interest to you (e.g. John Donor Family Fund, or the Donor Fund for the Arts). Unless you choose to remain anonymous, the name of your fund will be used in correspondence to the charitable organizations that receive grants from the fund.

Fund Name _____

Who is the fund for? Individual Family Ministry Church Company

If fund is being opened by a church, ministry, or company, please list the organization's name.

Donor Information

Donor of Record*

Mr. Mrs. Ms.

Full Name _____

Date of Birth _____

Address _____

Street

City

State

Zip

Primary Phone Home Cell Business _____

Email Address _____

Additional Donor*

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 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 _____

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?

Advisor: _____

Donor: _____

Church/Ministry: _____

Online/Print: _____

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 (at thesignatry.com/donor-advised-fund/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 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

For more information on The Signatry's investment pools, please visit 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

Address Street

City State Zip

Phone Fax

Email Address

Successor Information

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 donor advised fund. A succession plan allows us to continue your legacy. You may designate 1) organizations to receive your grants from your fund and/or 2) successor advisor(s) to continue advising the fund in your absence.

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 donorcare@thesignatry.com or call 913-310-0279.

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

Please fill out either Option 1 or Option 2.

Option 1: Leaving Your Fund to Charities

Organization Name
Address
Street
City State Zip
Primary Phone Home Cell Business
Email Address
Portion of Fund to be Granted to the Organization: %

Organization Name
Address
Street
City State Zip
Primary Phone Home Cell Business
Email Address
Portion of Fund to be Granted to the Organization: %

Option 2: Naming Successor Advisors to Continue Advising Your Fund

Primary Successor

Full Name
Address
Street
City State Zip
Primary Phone Home Cell Business
Email Address
Date of Birth
Relation

Secondary Successor

Full Name
Address
Street
City State Zip
Primary Phone Home Cell Business
Email Address
Date of Birth
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)

Naming a successor or charity 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 donorcare@thesignatry.com or call 913-310-0279.

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) 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 _____

Printed Name of Donor _____

Date _____

Signature _____

Printed Name of Donor _____

Date _____