

Instructions

Please complete all information on this application 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, you can log-in at our website at thesignatry.com to contribute 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

Create a name for your fund in this section. Unless you choose to remain anonymous, the name of the fund will be used in grantee correspondence.

Fund Name

Fund Mission Statement

Optional

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 Authorized Person (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 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.

Authorized Person: Accountant Attorney Financial Advisor Other _____

Authorized Person's Name and Title _____

Firm Name _____

Address _____
Street

City _____ State _____ Zip _____

Phone _____

Email Address _____

I authorize my authorized person/user to access my fund:

- Full Access**—Complete access to the fund
- Read Only + Investments**—View only access plus updating investment settings
- Read Only + Grants**—View only access plus recommending grants
- Read Only**—View only access without the ability to recommend grants or changes to the fund

How Did You First Hear About The Signatry?

Advisor: _____

Donor: _____

Church/Ministry: _____

Online/Print: _____

Staff/Board Member: _____

Investment Options

Your donor advised fund with The Signatry can be invested in The Signatry’s biblically responsible investment pools, or you can recommend a financial advisor to manage the fund’s investments. Learn more about the investment pools at www.thesignatry.com/investments.

Funds will be invested in the money market if no options are selected.

Investment Option 1: Recommend Investment Pools

If you choose to have the donor advised fund invested with The Signatry’s biblically responsible investment pools, please indicate below the 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**

When deposits and withdrawals are processed from this donor advised fund, the money will be invested or liquidated according to these instructions. For more advanced configurations, please navigate to the online fund settings or contact our team.

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; final selection is made by The Signatry. All managers retained by The Signatry must adhere to The Signatry’s investment policies. If you have selected Option 1, you do not need to recommend a financial advisor.

Company _____

Advisor Name _____

Address _____

Street

City _____ State _____ Zip _____

Phone _____ Fax _____

Email Address _____

Successor Information

To continue your charitable legacy, you can recommend a plan that could be implemented in the event of your death or incapacity. You may recommend 1) organizations to receive grants from your fund and/or 2) successor advisors to continue advising the fund in your absence.

These are the two most common choices for fund succession, but beyond these options, you may be able to recommend a more tailored plan that aligns with your wishes for your fund's legacy. 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 Succession Plan Form.

Please fill out either Option 1 or Option 2.

Option 1: Recommend Leaving Your Fund to Charities

Organization Name _____

Address _____
Street

City _____ State _____ Zip _____

Primary Phone Home Cell Business _____

Email Address _____

Recommend Percent of Fund to be Granted to the Organization: _____ %

Organization Name _____

Address _____
Street

City _____ State _____ Zip _____

Primary Phone Home Cell Business _____

Email Address _____

Recommend Percent of Fund to be Granted to the Organization: _____ %

Option 2: Recommend 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 recommend 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)

Acknowledgment

By signing below, I, the undersigned donor:

1. 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;
2. Understand that all assets held in a donor advised fund at The Signatry are The Signatry's property and subject to The Signatry's exclusive legal control;
3. Understand that funds granted from a donor advised can be used only for charitable purposes and not for the benefit of a donor or donor advisor or for any other purpose conferring impermissible private benefit;
4. Acknowledge 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 all assets in a donor advised fund;
5. Acknowledge that I have read and agree to this Application and The Signatry User Agreement.

Signature _____

Printed Name of Donor _____

Date _____

Signature _____

Printed Name of Donor _____

Date _____