

## Instructions

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Please complete all information in this application to open a charity fund with The Signatry. Print in ink or type. If you need assistance with the application, please contact our team at [913-310-0279](tel:913-310-0279). After the fund is open, you can log-in at our website at [thesignatry.com](http://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](mailto: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 [www.thesignatry.com/charity-funds](http://www.thesignatry.com/charity-funds).

Please include the name of the organization the charity fund is for in your fund name (ie. The First Baptist Church Charity 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

City

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State

Zip

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 \_\_\_\_\_

### Adding an Additional Authorized Person (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 recommend a financial advisor to 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 the above 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?**

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

**Investment Options**

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Your charity 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 charity fund’s investments. Learn more about the investment pools at [www.thesignatry.com/investments](http://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 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**

When deposits and withdrawals are processed from this 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 investments 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. Funds will be invested in the money market if no options are selected.

Company

Advisor Name

Address

Street

City State Zip

Phone Fax

Email Address

Acknowledgment

By signing below, I, the undersigned authorized charity representative:

- 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 charity 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 charity fund 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 an authorized charity representative is advisory in nature and that The Signatry has the sole and exclusive authority and discretion to invest and disburse all assets in a charity fund;
5. Acknowledge that I have read and agree to this Application and The Signatry User Agreement.

Authorized Signer for Charity

Printed Name of Signer for Charity Date

Authorized Signer for Charity

Printed Name of Signer for Charity Date