

Instructions

Please complete all information in this application to open a designated 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

Designated Fund Information

A designated fund with The Signatry is used for designating gifts to a single ministry or charity. To learn more about designated funds, visit thesignatry.com.

Most designated funds include the organization and the donor's name in the fund name. (ie. The Jane Smith First Baptist Church Designated Fund). Unless you choose to remain anonymous, the name of the fund will be used in grant correspondence.

Fund Name

Designated Charity*

Charity Name

Tax ID/EIN

Web Address

Address

Street

City

State

Zip

Phone

Email Address

*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. The Signatry may, in its sole discretion, close the designated fund and distribute the assets to another charity. For example, this will happen if the designated charity ceases to qualify to receive grants under the Code or The Signatry User Agreement (available online at thesignatry.com/agreement).

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 Authorized Person (if Applicable)

If you wish for your professional advisor to be able to access your fund, please complete the information below. (To have a financial advisor manage your fund's investments, please complete "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 authorized 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 designated 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 designated 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 designated 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 designated 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.

For more information on The Signatry's investment pools, please visit www.thesignatry.com/investments

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 advisor 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 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

Please provide The Signatry with advice regarding the distribution of this fund in the event of your incapacity or death.

Please fill out either Option 1 or Option 2.

Option 1: Final Distributions to Designated Charity:

Please provide recommendations on amount and timing for distributions. Funds will be distributed until the balance is \$0.

Grant Amount: \$

Monthly:

Quarterly:

Yearly:

Organization Name

Address

Street

City

State

Zip

Primary Phone Home Cell Business

Email Address

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 _____

Requests to modify succession options once the fund is set up may be submitted through a Succession Plan Form.

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 designated 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 designated 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 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 designated 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 _____