

Instructions

Please use this form to submit changes to your fund. If you need assistance, call 913-310-0279.

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

Fund Information

Fund Name

Fund ID

Changing Fund Name

New Fund Name

Adding or Removing an Authorized Person on the Fund

I would like to:

- Add** (allow access to fund information, including current and historical data and transactions regarding the fund)
- Remove** (terminate all access and rights to fund)

Full Name

Company (if applicable)

Address

Street

City

State

Zip

Primary Phone Home Cell Business

Email Address

Role Access:

- 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

Fund Name _____

Fund ID _____

Additional Person

I would like to:

- Add** (Provide advisory rights to fund information including current and historical data and transactions regarding the fund)
- Remove** (terminate all access and rights to fund)

Full Name _____

Company (if applicable) _____

Address _____

Street

City

State

Zip

Primary Phone Home Cell Business _____

Email Address _____

Role Access:

- 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

Fund Name _____

Fund ID _____

Recommend Investment Pool Changes

Your 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.

If you choose to have the 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:

Investment Pools

_____ % **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.

Acknowledgment

By signing below: (1) I, the undersigned donor or authorized signer, 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 Form 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.

Donor or Authorized Signer _____

Printed Name _____

Date _____

Donor or Authorized Signer _____

Printed Name _____

Date _____