PRESBYTERIAN FOUNDATION

Creative Gift Fund Application

Please complete the following application to establish a Creative Gift Fund with the Presbyterian Foundation. For complete policies and Fund information, please read the Creative Gift Fund Program Guide. If you need assistance in completing this form, please contact us at 800-858-6127.

1. *Creative Gift Fund* Donor & Advisor Information

Primary Donor & Advisor

Title First Name Initial Last Name

Date of Birth Social Security Number

Address: including PO Box, street address, suite or apartment number

City State Zip

Home Telephone Business/Cell Fax

Email address (*Necessary to access your account online*)

❒ Please set up online access.

Preferred Method of Contact (check one)

❒ Email ❒ Home Phone ❒ Business/cell Phone ❒ Mail

Joint Donor & Advisor

Title First Name Initial Last Name

Date of Birth Social Security Number

Address: including PO Box, street address, suite or apartment number

City State Zip

HomeTelephone Business/Cell Fax

Email address (*Necessary to access your account online*)

❒ Please set up online access.

Preferred Method of Contact (check one)

❒ Email ❒ Home Phone ❒ Business/cell Phone ❒ Mail

Unless instructed (by separate attachment), the Foundation will accept recommendations from either of the individuals named above as Primary Advisors to the Fund. The Primary Advisor(s) may designate in writing two persons to act as grant advisors. To add grant advisors, please provide the above information for each grant advisor on a separate sheet. The grant advisors to your Fund may recommend grants only. They may also make contributions to the Fund as a third-party donor.

2. *Creative Gift Fund* Information

What would you like to name your fund?

For example: Jones Family Fund, State Street Church Fund, etc. The Fund name will appear on all Fund correspondence, as well as all correspondence that accompanies grants (distributions) from the Fund. If you prefer to be anonymous, please indicate this preference when you make a grant recommendation.

3. Contribution Information

The initial contribution to establish a Creative Gift Fund is $2,500. Please refer to the Creative Gift Fund's Program Guide for information on the types of gifts the Foundation can accept.

Please check the type of contribution you will be making:

❒ **Check(s) in the amount of $ ___________________**
Check(s) should be made payable to *Presbyterian Foundation.* Please include the Fund Name in the memo section on the check. Mail to the Foundation at 200 East Twelfth Street, Jeffersonville, IN 47130.

❒ **Funds wired in the amount of $ ___________________**
Please visit www.PresbyterianFoundation.org for wiring instructions; click on *Make a Contribution.*

❒ **Transfer assets from another donor advised fund**
Please contact a Foundation representative at 800-858-6127, ex.5919.

❒ **Credit card gift**
❒ Visa ❒ MasterCard ❒ Discover ❒ American Express

Name on Card ________________________________

Card # ______________________________________

Exp. Date ________ 3-digit security code _________

❒ **Publicly traded securities or mutual fund shares**
Name of stock or mutual fund

____

Number of shares _________
Please visit www.PresbyterianFoundation.org for security transfer instructions; click on *Make a Contribution* or contact the Foundation at 800-858-6127, ex 5919.

❒ **A non-liquid gift, such as real estate, artwork, etc.**
Please contact the Foundation at 800-858-6127, ex.8969 or email remittances@fdn.pcusa.org.

❒ **A Trust Revocation Notification must be completed if the Gift assets are titled to a revocable trust.**
Please visit www.PresbyterianFoundation.org for the required form; click on *Make a Contribution* or contact the Foundation at 800-858-6127, ex 5919.

4. Investment Recommendation

Recommendations and actual reallocation are subject to Foundation approval. Contributions, grants, and investment activity may affect the actual date of investment allocation. Primary Advisors are welcome to make asset allocation recommendations by using more than one portfolio to reflect the expected timing and amount of their grant recommendation. If no choice is made, the assets will be invested in the Creative Gift Money Portfolio. Percentages listed below are for the initial account set-up. The Primary Advisor may recommend asset allocation changes monthly.

Choose from the following options. **Please indicate percentages.**

❒ **Creative Gift Money Portfolio** _____ %
Seeks to preserve the nominal or par value of assets and to provide income commensurate with money market rates.

❒ **Creative Gift Income Portfolio** _____ %
Seeks current income that is commensurate with a quality bond portfolio while pursuing investments that are consistent with social-witness principles approved by the General Assembly of the Presbyterian Church (U.S.A.).

❒ **Creative Gift Equity Portfolio** _____ %
Seeks returns that are commensurate with a diversified portfolio of stocks issued by domestic and international companies while pursuing investments that are consistent with social-witness principles approved by the General Assembly of the Presbyterian Church (U.S.A.).

❒ **Creative Gift Balanced Portfolio** _____ %
Seeks returns that are commensurate with a 60%/40% target allocation of assets underlying the Creative Gift Equity Portfolio and the Creative Gift Income Portfolio, respectively.

5. Successor Advisor Information

You may wish to provide the Foundation with a "succession plan" for the Creative Gift Fund you establish, in the event of your death or incapacity. There are two options for the remaining assets in the Fund, and you may select one of these.
A. You may name Successor Advisors to the account to succeed you after your death OR
B. You may elect to distribute the balance of your fund to as many as five different ministries or charities.
If no option is chosen, your Fund will be distributed to the Presbyterian Church (U.S.A.).

Please complete either Section A or Section B below.

A. Name Successor Advisors for your Fund

If no percentages are entered, the Foundation will accept advice from one or both of the Successor Advisors for the Fund balance.

Successor Advisor ________ % of Fund balance

Title First Name Initial Last Name

Date of Birth Social Security Number

Address: including PO Box, street address, suite or apartment number

City State Zip

Successor Advisor ________ % of Fund balance

Title First Name Initial Last Name

Date of Birth Social Security Number

Address: including PO Box, street address, suite or apartment number

City State Zip

B. Distribute to a Ministry or Charity

You may name as many as 5 charities. Please indicate percentage of distribution to each. Please photocopy this sheet if you need additional space. In the event the charity no longer exists, the Presbyterian Foundation will award grants to charities similar to the original charity.

Organization Name

Address: including PO Box, street address, suite number

City State Zip Phone or Employer Identification Number (Required)

Please indicate percentage of distribution ______ %

Organization Name

Address: including PO Box, street address, suite number

City State Zip Phone or Employer Identification Number (Required)

Please indicate percentage of distribution ______ %

6. Financial Advisor Information (If applicable)

If you work with a financial advisor whom you choose to have access to your account, please fill out this section to give your advisor permission for account access. This will entitle them to make asset allocation recommendations only.

Type of Advisor: ❒ Accountant ❒ Attorney ❒ Financial Planner
❒ Investment Manager ❒ Other (specify) ____________________

Professional Advisor Name | Firm Name

Mailing Address: including PO Box, street address, suite number

City | State | Zip

Telephone | Email

7. Signatures

I/We hereby make the following donation with the full understanding that it represents an irrevocable donation to the Presbyterian Foundation's *Creative Gift Fund*. I also acknowledge that I have read completely the Program Guide and the terms and/or the conditions described therein. I acknowledge that I have received the Foundation's Privacy Notice with this application and have read and understand the information contained in the Privacy Notice. I further acknowledge that the Foundation has not rendered any legal or tax advisory service to me and that I should consult with my own advisors to determine the tax or other benefits and consequences of making this gift.

Primary Donor Signature (Required) | Date

Joint Donor/Signature (Required, if gift is made by joint donors) | Date

FACTS	What does the Presbyterian Church (USA) Foundation ("Presbyterian Foundation") do with your personal information?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: - Social Security number and account balances - payment history and transaction history - account transactions and checking account information When you are *no longer* our customer, we continue to share your information as described in this notice.
How?	All financial companies need to share clients' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their clients' personal information; the reasons the Presbyterian Foundation chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Presbyterian Foundation share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	Yes
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	**- Call 800-858-6127 or** **- Mail the form below** Please note: If you are a new customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.
Questions?	**Call 800-858-6127 or go to www.presbyterianfoundation.org**

Mail-in Form

Mark any/all you want to limit:

_____ Do not share my personal information with other financial institutions to jointly market to me.

_____ Do not share information about my transactions and experiences with your affiliates for their everyday business purposes.

_____ Do not share information about my creditworthiness with your affiliates for their everyday business purposes.

_____ Do not allow your affiliates to use my personal information to market to me.

_____ Do not share my personal information with nonaffiliates to market their products and services to me.

Name	
Address	
City, State, Zip	

Mail To: **Presbyterian Foundation**
200 E. 12th Street, Jeffersonville, IN 47130

What we do	
How does the Presbyterian Foundation protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. Email addresses will only be provided to affiliates or service providers. Cookies are not used to get data from your hard drive, to get your email address or personal information.
How does the Presbyterian Foundation collect my personal information?	We collect your personal information, for example, when you - open an account or provide account information - give us your contact information or pay us by check - tell us your investment or retirement portfolio We also collect your personal information from others, such as credit bureaus, affiliates or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only - sharing for affiliates' everyday business purposes information about your creditworthiness - affiliates from using your information to market to you - sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. [See below for more on your rights under state law.]
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. - *Our affiliates include the Presbyterian Church (USA), A Corporation and New Covenant Trust Company, N.A.*
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. - *Nonaffiliates we share with can include New Covenant Funds.*
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. - *Our joint marketing partners include New Covenant Funds.*
Other important information - **If you are a resident of Vermont, you are automatically considered to have opted out of sharing with our affiliated and nonaffiliated companies.**	