

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

## I. DONOR-ADVISED FUND DONOR & ADVISOR INFORMATION

### PRIMARY DONOR & ADVISOR

\_\_\_\_\_  
Title First Name Initial Last Name

\_\_\_\_\_  
Date of Birth

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

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone  Home Phone  Business  Cell Phone

\_\_\_\_\_  
Email address *(required)*

### JOINT DONOR & ADVISOR

\_\_\_\_\_  
Title First Name Initial Last Name

\_\_\_\_\_  
Date of Birth

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

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone  Home Phone  Business  Cell Phone

\_\_\_\_\_  
Email address *(required)*

*Unless instructed (by separate attachment), the Foundation will accept recommendations from either of the individuals named above as Primary Advisors to the Fund.*

## 2. DONOR-ADVISED FUND INFORMATION

**NAME OF 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 Donor-Advised Fund is \$2,500. Please refer to the Donor-Advised 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 of the check. Mail to Presbyterian Foundation at 200 East Twelfth Street, Jeffersonville, IN 47130.*

**Funds wired in the amount of \$\_\_\_\_\_.**

*Please contact a Foundation representative at 800-858-6127, ex 5919.*

**Transfer assets from another Donor-Advised Fund.**

*Please contact a Foundation representative at 800-858-6127, ex 5919.*

**Credit or debit card.**

*To fund a Donor-Advised Fund using a credit or debit card, please visit [presbyterianfoundation.org/daf](http://presbyterianfoundation.org/daf).*

**Publicly traded securities or mutual fund shares**

Name of stock or mutual fund \_\_\_\_\_

Number of shares \_\_\_\_\_

*Please visit [www.PresbyterianFoundation.org](http://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.5918.*

**A Trust Revocation Notification must be completed if the Gift assets are titled to a revocable trust.**

*Please visit [www.PresbyterianFoundation.org](http://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 Money Portfolio. Percentages listed below are for the initial account set-up. The Primary Advisor may recommend asset allocation changes at any time. All changes will be executed at the beginning of the next financial quarter.

### ALLOCATIONS SHOULD BE MADE IN 5% INCREMENTS.

**LARGE EQUITY BLEND** \_\_\_\_\_% Vanguard 500 Index Fund (VFIX)

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**MID CAP EQUITY BLEND** \_\_\_\_\_% Fidelity Low-Priced Stock (FLPSX)

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**SMALL CAP EQUITY** \_\_\_\_\_% Vanguard Small Cap Growth Index (VISGX)

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**INTERMEDIATE TERM BOND** \_\_\_\_\_% Vanguard Interm-Term Bond Index Inv (VBIX)

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**BALANCED MODERATE ALLOCATION** \_\_\_\_\_% Vanguard Balanced Index Inv (VBINX)

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**BALANCED CONSERVATIVE ALLOCATION** \_\_\_\_\_% Vanguard Wellesley Income Inv (VWINX)

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**SOCIALLY RESPONSIBLE** \_\_\_\_\_% New Covenant Growth Fund (NCGFX)

\_\_\_\_\_% New Covenant Income Fund (NCICX)

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**MONEY MARKET** \_\_\_\_\_% Fidelity Money Market (FRGXX)

## 5. SUCCESSOR ADVISOR AND DISTRIBUTION INFORMATION

You may wish to provide the Foundation with a “succession plan” for the Donor-Advised 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.

#### SUCCESSOR ADVISOR

Title First Name Initial Last Name

Date of Birth

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

City State Zip

Phone  Home Phone  Business  Cell Phone

Email address (required)

#### SUCCESSOR ADVISOR

Title First Name Initial Last Name

Date of Birth

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

City State Zip

Phone  Home Phone  Business  Cell Phone

Email address (required)

### B. DISTRIBUTE TO A MINISTRY OR CHARITY

You may name as many as five 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

Federal Employer Identification Number (required)

Address: including PO Box, street address, suite number

City State Zip

Phone Number

Please indicate percentage of distribution \_\_\_\_\_%

Organization Name

Federal Employer Identification Number (required)

Address: including PO Box, street address, suite number

City State Zip

Phone Number

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

\_\_\_\_\_  
Address: *including PO Box, street address, suite number*

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
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 Donor-Advised 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

## 8 MAILING INSTRUCTIONS

Three options to submit this form:

**MAIL:** Presbyterian Foundation • 200 East Twelfth Street • Jeffersonville, IN 47130

**FAX:** 502-805-0466

**EMAIL:** Scan and send to [adminservices@presbyterianfoundation.org](mailto:adminservices@presbyterianfoundation.org)



## What does the Presbyterian Church (USA) Foundation ("Presbyterian Foundation") do with your personal information?

### FACTS

<b>Why?</b>	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.	
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>- Social Security number and account balances</li> <li>- payment history and transaction history</li> <li>- account transactions and checking account information</li> </ul> <p>When you are <i>no longer</i> our customer, we continue to share your information as described in this notice.</p>	
<b>How?</b>	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.	
	<b>Reasons we can share your personal information</b>	<b>Does Presbyterian Foundation share?</b>
	<b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes
	<b>For our marketing purposes -</b> to offer our products and services to you	Yes
	<b>For joint marketing with other financial companies</b>	Yes
	<b>For our affiliates' everyday business purposes -</b> information about your transactions and experiences	Yes
	<b>For our affiliates' everyday business purposes -</b> information about your creditworthiness	Yes
	<b>For our affiliates to market to you</b>	Yes
	<b>For nonaffiliates to market to you</b>	Yes
<b>To limit our sharing</b>	<p>- Call 800-858-6127 or - Mail the form below</p> <p>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 <i>no longer</i> 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.</p>	
<b>Questions?</b>	Call 800-858-6127 or go to <a href="http://www.presbyterianfoundation.org">www.presbyterianfoundation.org</a>	

### 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.

<b>Name</b>	
<b>Address</b>	
<b>City, State, Zip</b>	

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

<b>What we do</b>	
<b>How does the Presbyterian Foundation protect my personal information?</b>	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.
<b>How does the Presbyterian Foundation collect my personal information?</b>	We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>- open an account or provide account information</li> <li>- give us your contact information or pay us by check</li> <li>- tell us your investment or retirement portfolio</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates or other companies.
<b>Why can't I limit all sharing?</b>	Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>- sharing for affiliates' everyday business purposes information about your creditworthiness</li> <li>- affiliates from using your information to market to you</li> <li>- sharing for nonaffiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing. [See below for more on your rights under state law.]
<b>What happens when I limit sharing for an account I hold jointly with someone else?</b>	Your choices will apply to everyone on your account.
<b>Definitions</b>	
<b>Affiliates</b>	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>- <i>Our affiliates include the Presbyterian Church (USA), A Corporation and New Covenant Trust Company, N.A.</i></li> </ul>
<b>Nonaffiliates</b>	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>- <i>Nonaffiliates we share with can include New Covenant Funds.</i></li> </ul>
<b>Joint marketing</b>	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>- <i>Our joint marketing partners include New Covenant Funds.</i></li> </ul>
<b>Other important information -</b> <b>If you are a resident of California or Vermont, you are automatically considered to have opted out of sharing with our affiliated and nonaffiliated companies.</b>	