

INSTRUCTIONS

Please complete all information on this application to open a donor advised fund with The Signatry. Print in ink, type, or complete using software. If you need assistance, you may contact your financial advisor or call 913-310-0279. After the fund is open, you can log in using 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

DONOR ADVISED FUND INFORMATION

Create a name for the fund in this section. The name of the fund will be used in grantee correspondence, unless you indicate on the grant recommendation that you wish to remain anonymous.

Fund Name "The _____ Fund"

Fund Mission Statement

Optional

DONOR ADVISOR INFORMATION

Fund Holder*

Title Full Name Date of Birth

Address

Street City State ZIP

Primary Phone Home Cell Business

Email Address

Additional Donor Advisor*

Title Full Name Date of Birth

Address

Street City State ZIP

Primary Phone Home Cell Business

Email Address

* The Fund Holder is the primary Donor Advisor. Reports, statements, confirmations, receipts, etc. will be mailed to the Fund Holder only.

ADDING AN ADDITIONAL AUTHORIZED PERSON (IF APPLICABLE)

If you wish for a professional advisor to be able to access the fund, please fill out the information below. (To recommend a financial advisor to manage the fund's investments, please fill out "Option 3: Advisor Managed Account" on the next page.) If you do not wish to give a professional advisor access, you can leave this section blank.

Authorized Person:

Accountant	Attorney	Financial Advisor	Other
Title	Full Name	Date of Birth	
Firm Name			
Address			
Street	City	State	ZIP
Phone			
Email Address			

I authorize my authorized person to access my fund:

Full Access—Complete access to the fund*

Read Only + Grants—View only access plus recommending grants*

Read Only + Investments—View only access plus recommending investment selections*

Read Only—View only access without the ability to recommend grants or changes to the fund

** I acknowledge that by granting my authorized person access to make recommendations in the fund, that authorized person can do so autonomously, and that there exists a potential tax liability if fund activity is not carried out according to IRS specifications.*

HOW DID YOU FIRST HEAR ABOUT THE SIGNATRY?

Advisor: _____

Donor: _____

Nonprofit/Ministry: _____

Online Search: _____

Advertisement: _____

Staff/Board Member: _____

INVESTMENT OPTIONS

The balance of a donor advised fund at The Signatry is held in our money market fund for easy access for grant recommendations. Additionally, you can recommend that a portion of the donor advised fund balance be invested. Investment options include The Signatry's biblically responsible investment pools and the option to recommend a financial advisor to manage the fund's investment.

Funds will be invested in the money market pool if no options are selected.

Option 1: Money Market

Please keep the balance of the donor advised fund in The Signatry's money market fund.

Option 2: Biblically Responsible Investment Pools

Please have a team member of The Signatry contact me about investing a portion of the donor advised fund balance in biblically responsible investment pools.

Option 3: Advisor Managed Account (AMA)

If you have selected another option above, you do not need to recommend a financial advisor.

I recommend the advisor listed below to manage a portion* of the balance of the donor advised fund at The Signatry.

Firm	Advisor Name		
Address			
Street	City	State	ZIP
Phone	Fax		
Email Address			

**The Signatry requires all funds with AMAs to maintain the lesser of 10% of the total grantable value of the fund or one quarter's worth of historical or anticipated grant recommendations in The Signatry's money market fund for grant processing.*

ACKNOWLEDGMENT

By signing below, I, the undersigned:

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 donor advised 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 donor advised fund can be used only for charitable purposes and not for the benefit of a donor (one who contributes to the fund), donor advisor (one who makes recommendations for grants from the fund), or investment manager (one who makes recommendations for investments of the fund balance), or for any other purpose conferring impermissible private benefit;
4. Acknowledge that my role is advisory in nature and that The Signatry has the sole and exclusive authority and discretion to invest and disburse all assets in a donor advised fund.

Fund Holder

Signature _____

Printed Name _____

Date _____

Additional Donor Advisor

Signature _____

Printed Name _____

Date _____