



# DONOR-ADVISED FUND APPLICATION

The minimum initial contribution to a new Donor-Advised Fund is \$5,000 and each additional contribution must be at least \$1,000.

## 1) COMPLETION AND TRANSMISSION INSTRUCTIONS

**PREFERRED METHOD** - Donors or Grant Advisors who are clients of StrategIQ Financial Group, LLC ("StrategIQ") have the option to complete and transmit this donor-advised fund application ("Application") via DocuSign. This is the most efficient option and the one that we recommend. Upon completion of the DocuSign process, the Application will be transmitted automatically, first to StrategIQ and then to Renaissance Charitable Foundation Inc.

Another secure, but less efficient option, is for such a Donor or Grant Advisor to complete this Application by typing into the Application all information requested therein or by hand-writing such information with ink and block letter print, uploading such completed form to the StrategIQ client portal of such Donor or Grant Advisor, and sending an email to or call the StrategIQ financial advisor of such Donor or Grant Advisor to let such advisor know that such completed Application has been uploaded to the StrategIQ client portal. Once StrategIQ receives such uploaded completed typed or hand-written document and such email or phone notice, StrategIQ will transmit the uploaded document for processing to Renaissance Charitable Foundation Inc.

Alternative transmission methods to Renaissance Charitable Foundation Inc. are email to [sfg@reninc.com](mailto:sfg@reninc.com), fax to 877-222-1829 or mail to StrategIQ Donor-Advised Fund Program, 8910 Purdue Rd, Suite 555, Indianapolis, IN 46268. For assistance, please contact your financial advisor at StrategIQ, contact Renaissance Charitable Foundation Inc. at 1-800-942-0219, or visit the web site [sfg.reninc.com](http://sfg.reninc.com).

## 2) DONOR-ADVISED FUND INFORMATION

A Donor-Advised Fund can be named after a Donor, a member of the Donor's family, the Donor's family, or it can reflect an area of interest to the Donor or such family member (e.g. John Donor Family Fund, or the Donor Fund for the Arts). Unless a Donor or Grant Advisor recommends that a grant be made anonymously, the name of the Donor-Advised Fund will be used in correspondence to the charitable organization that receives the grant from the Fund.

Donor-Advised Fund Name

Recommended Primary Charitable Area or Areas of Interest (e.g., cancer research, education, historic preservation)

## 3) DONOR INFORMATION

Name the Donor(s) who will contribute to and advise on the Fund. Please note that the Primary and Additional Donor will automatically be established as Grant Advisors. To name additional Grant Advisors, complete Section 5.

PRIMARY DONOR\*

Mr.  Mrs.  Ms.

Full Name

Social Security number

Date of Birth

Street Address

City

State

Zip

Home Phone

Business Phone

Mobile Phone

Email Address

ADDITIONAL DONOR\*

Mr.  Mrs.  Ms.

Full Name

Social Security number

Date of Birth

Street Address

City

State

Zip

Home Phone

Business Phone

Mobile Phone

Email Address

\* Reports will be mailed to the Primary Donor only.



## 4) CONTRIBUTIONS

A Donor to a Donor-Advised Fund may transfer cash (via wire or check), publicly traded securities, or other property to Renaissance Charitable Foundation, Inc. (“RCF”) per the instructions below.

### GIFTS BY WIRE TRANSFER

\$ \_\_\_\_\_

#### WIRE TRANSFER INSTRUCTIONS:

Bank: Wells Fargo Bank, NA  
ABA#: 121000248  
For credit to:  
TD Ameritrade Clearing, Inc.  
200 South 108th Avenue  
Omaha, NE 68154  
Account #4123214561  
For benefit of: TD Ameritrade account #868917980  
FBO: Renaissance Charitable Foundation Inc.

### CASH GIFTS BY CHECK

\$ \_\_\_\_\_

If you chose to deliver or send physical checks to StrategIQ, rather than directly to RCF, StrategIQ will forward the check to RCF, but please note that the check delivery to RCF will be delayed.

#### MAIL INSTRUCTIONS:

- **Make check payable to:**  
Renaissance Charitable Foundation, Inc.
- **Include in the memo section of the check:**  
Donor name or Fund name
- **Mail check to:**  
Renaissance Charitable Foundation, Inc.  
c/o StrategIQ Donor-Advised Fund Program  
8910 Purdue Road, Suite 555  
Indianapolis, IN 46268

### GIFTS OF PUBLICLY-TRADED SECURITIES

There are two main ways to make a stock gift to RCF: by electronic transfer or by mailing your certificates. Electronic transfer works much faster.

The date of a Donor’s gift is the date on which the Donor gives up control. In most cases, this is the date the Donor transfers the shares electronically into RCF’s account or the postmark date on which the Donor mails the Donor’s certificates, stock powers, stock waivers, and/or Letters of Authorization to RCF. In some cases, the date of the gift is delayed until the company’s transfer agent changes its official records to reflect ownership of the shares by RCF. In most cases, the tax-deductible value of a Donor’s gift is the average of the highest and lowest trading prices on the date of the Donor’s gift multiplied by the number of shares given.

### ELECTRONIC TRANSFER OF PUBLICLY-TRADED SECURITIES

A Donor must complete the information below relating to the securities subject to the gift. **Please note that Renaissance Charitable Foundation, Inc. does NOT initiate the asset transfer.** A Donor must complete the letter of authorization transfer form of the custodian that holds the securities that the Donor intends to transfer, and submit the same to such custodian or the Donor’s financial advisor, in order for the transfer to be initiated.

\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value



\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

\_\_\_\_\_|\_\_\_\_\_  
Name of Custodian (that holds and will deliver the securities) | Owner/s of Security

\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_|\_\_\_\_\_  
Name of Security Issuer | CUSIP or symbol | Number of shares | Approximate dollar value

**PLEASE NOTE:** The above securities will be transferred in kind.

### MAILING OF SECURITIES HELD IN CERTIFICATE FORM

Please contact Renaissance Charitable Foundation at (800) 942-0219 for forms needed to gift share certificates. DO NOT sign the back of your certificate(s). Doing so will delay the date of a donor's gift until the certificates are transferred into the name Renaissance Charitable Foundation Inc. of the company whose securities are being gifted.

### GIFTS OF PROPERTY OTHER THAN CASH OR SECURITIES

Please contact Renaissance Charitable Foundation at (800) 942-0219 for forms needed to gift property other than cash or securities.



## 5) GRANT ADVISORS

A Donor can appoint one or more individuals as Grant Advisors of the Fund. These Grant Advisors will have authority to recommend grants to be made by the Fund. Grant Advisors appointed by Donor will not succeed the Donor unless they are named as Fund Successors (see Section 6 below). Do not list in this Section 5 any Donor(s) named in Section 3, as such Donors are automatically established as Grant Advisors.

### GRANT ADVISOR 1:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street address of residence (no P.O. Box address)		City	State	Zip
Mailing address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

### GRANT ADVISOR 2:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street address of residence (no P.O. Box address)		City	State	Zip
Mailing address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

## 6) FUND SUCCESSORS AND CHARITABLE BENEFICIARIES

Donors have the option to recommend what should occur with the Fund upon their death. All are subject to the approval of RCF. There are three options:

- (1) The Donors name one or more successor grant advisors to the Fund to succeed the Donors after their death (Successor Grant Advisors).
- (2) The Donors recommend specific (Charitable Beneficiaries) that shall receive either
  - (A) all of the remaining assets with respect to the Fund, OR
  - (B) annual grants from the remaining assets in the Fund (the recommended annual grants may be a percentage of the annual value of the Fund or a set dollar amount per charity, but, if the aggregate value of the annual grants is less than 4% of the annual value of the Fund, RCF will increase the grants pro rata so that the aggregate value of the annual grants is 4% of the annual value of the Fund).
- (3) The Donors make a recommendation in a letter of instruction delivered to RCF. Letters of instructions typically are used in connection with large contributions and include a level of specificity beyond the scope of this form.

Please fill-in either the Successor Grant Advisor(s) section immediately below OR the Charitable Beneficiary(ies) section immediately thereafter (or attach a letter of instruction for review by RCF).

### SUCCESSOR GRANT ADVISOR(S)

Upon the death or incapacity of all of the original Donors of the Fund, please select one of the following options:

- Successor Grant Advisors will succeed the Fund and share equal responsibility.
- Successor Grant Advisors will split the Fund. The Fund will be divided equally among the Successor Grant Advisors. Your financial advisor will contact the Successor Grant Advisors to name each newly created Fund, and, if necessary, to reallocate investments and to name advisor(s) and Successor Grant Advisor(s) to the newly created Fund.



### SUCCESSOR 1:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street address of residence (no P.O. Box address)		City	State	Zip
Mailing address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

### SUCCESSOR 2:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street address of residence (no P.O. Box address)		City	State	Zip
Mailing address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

- OR -

### CHARITABLE BENEFICIARY(IES)

If the Donors would like that, upon the death of all original Donors, either all of the remaining assets in the Fund are granted, or an annual amount of no less than 4% of the assets that are in the Fund at any time during such year is granted, to a charitable organization(s), please complete this section in its entirety. In the event the recommended charity no longer exists or does not qualify to receive grants from a donor-advised fund, RCF will award grants to a charity similar to the original charity.

- Recommendation:** (please check the applicable one)
- Grant Of The Balance Of The Fund Assets
  - Annual Grant Of The Annual Value Of The Fund (Not Less Than 4%)

### CHARITABLE ORGANIZATION 1:

Official Name		
Mailing address (grants are mailed directly to the charitable organization)		
City	State	Zip
Tax ID number (if known)	Email address (if known)	Organization's website (if known)
Contact Person at Organization	Contact Phone	

If an Annual Grant is Recommended, the annual grant to Charitable Organization 1 shall be either \_\_\_\_% of the Annual Value, or \$\_\_\_\_\_.



## CHARITABLE ORGANIZATION 2:

Official Name

Mailing address (grants are mailed directly to the charitable organization)

City

State

Zip

Tax ID number (if known)

Email address (if known)

Organization's website (if known)

Contact Person at Organization

Contact Phone

**If an Annual Grant is Recommended, the annual grant to Charitable Organization 2 shall be either \_\_\_\_% of the Annual Value, or \$\_\_\_\_\_.**

## 7) RECOMMEND AN INVESTMENT STRATEGY

The DAF Program offers three investment strategies for Donors. After the Donor selects the particular investment strategy for the Fund, 100 percent of the initial and future contributions to the Fund are subject to such investment strategy (until the Grant Advisor with respect to such Fund recommends a change of investment strategy with respect to such Fund, which change, if any, shall not occur more than once per calendar quarter).

Please select one of the following investment strategies:

- Grow Strategy** - Donors with limited current grants who wish to increase the size of their fund towards a future endowment. Typically, annual grants will range from 0 - 3 % of fund value.
- Give & Grow Strategy** - Donors with annual gifting intent of about 3-5% of fund balances, looking to achieve some continued growth of fund balances.
- Give Strategy** - Donors with annual gifting intent of more than 5% of fund balances or expected depletion of fund balances in 2-5 years.

Contributions to a Fund are not held in a segregated investment account. Instead, all contributions to all Funds within the DAF Program for which the same investment strategy has been selected are aggregated into one investment account. Currently, there are three separate investment accounts, one per each investment strategy. RCF maintains individualized records with respect to each Fund, allowing each Donor or Grant Advisor of a specific Fund to view at any given time the investment balance, contribution history and grant history with respect to such Fund.



## 8) ACKNOWLEDGMENTS

The StrategIQ Donor-Advised Program is a program sponsored and operated by Renaissance Charitable Foundation, Inc., a 501(c)(3) national public charity under the Internal Revenue Code of 1986.

### BY SIGNING THIS APPLICATION:

The undersigned person or persons (hereafter referred to in the singular as Donor) authorizes the StrategIQ Donor-Advised Program to establish a Donor-Advised Fund. The Donor hereby acknowledges that Donor has received and read the DAF Program Circular and agrees to be legally bound by (1) the terms and conditions of the DAF Program Circular, as currently in effect and as amended from time to time by RCF, (2) the terms and conditions of the Application, or (3) any selection or recommendation made by Donor from time to time, whether in the Application, any other document or form related to the Donor-Advised Fund or otherwise communicated by the Donor, directly or indirectly, to RCF.

The Donor is aware that any recommendation suggested by the Donor in Donor's capacity as Grant Advisor, including concerning the selection of the investment strategy or the investment adviser or the amount or recipient of any grant award to any charitable organization, is advisory in nature. While any such recommendation of Donor will be considered by RCF, RCF has the sole and exclusive authority and discretion to reject any recommendation and make its own determinations, including as to the investment and disbursement of any contributions to any Donor-Advised Fund. The Donor understands that no grant may be made to a private non-operating foundation to satisfy a pre-existing pledge, for any private benefit (dues, membership, etc.) or to support any political campaign activity. The Donor understands that any contribution that Donor makes to RCF through the DAF Program is irrevocable and not refundable to Donor for any reason.

The Donor realizes that any dividend interest and capital gain generated from any Donor-Advised Fund belong to RCF; therefore, the Donor cannot and will not claim that income as additional tax deductions. Once any contribution is accepted, it is the property of RCF, governed by an independent Board of Directors. The Donor understands that RCF will charge the Fund (and deduct from any Fund balance) all applicable administration fees and investment advisory fees, in each case, consistent with its standard procedures. The Donor certifies that, to the best of the Donor's knowledge, all information presented in connection with this Application is accurate and agrees to notify RCF promptly of any changes.

\_\_\_\_\_|\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name of Donor

\_\_\_\_\_|\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name of Donor

*If married, both donors should sign*

**PLEASE COMPLETE AND TRANSMIT THIS DOCUMENT IN ACCORDANCE WITH THE INSTRUCTIONS IN THE FIRST SECTION OF THIS FORM.**