



Donor Advised Fund Application

Welcome to Your LegacyTODAY!

This short application will allow you to get started on this exciting new phase of your charitable work using a donor advised fund. A donor advised fund is a separately identified account maintained by United Charitable, a 501(c)(3) non-profit organization, and composed of contributions made by individual donors. Once you make a contribution, United Charitable is the legal owner of the assets, which allows you, the donor, to deduct those gifts from your personal taxes. Further, you retain advisory privileges with respect to the distribution of grants to charities as well as the investment of assets in the fund.

As you fill out this form, keep in mind that we are here to help you through the creation of your giving plan. We have many tools to help you. Feel free to call us at 571-620-3000 or e-mail info@unitedcharitable.org. And thank you, again, for choosing United Charitable.

Jan Ridgely, CEO

I. Naming Your Fund:

A donor advised fund shall be established as a fund at United Charitable and shall be known as the _____ Fund. (Acceptable naming protocols include your name, family or business name plus "Foundation" or "Fund." Please do not use the terms "LLC" "LLP" "Trust" "Association" or "Partnership" in the name.)

II. Purpose of Your Fund:

Please describe the charitable purpose of your fund. This will be your mission statement and will be used to describe your fund in print. For example: "To provide grants to worthy charities that promote quality secondary education in the USA." Or, you may check the second box below to select a mission statement for general charitable purposes.

Your Mission _____

"To periodically fund approved charitable, educational, scientific or religious activities."



III. Initial Contribution/s to Your Fund: Your fund may include an initial gift. Contributions may be added at any time and in any amount, subject to acceptance by United Charitable. We accept various types of assets (cash, stock, life insurance, business interests, real estate, and more). We also accept major credit cards. Please attach relevant paperwork or call our Finance Department, 571-620-3003, if you need help!

IV. Fund Advisors: The Primary Advisor is a person authorized to recommend grants from your fund and to make investment recommendations. If you name a Joint Advisor, s/he has the same advisory privileges.

Primary Advisor (generally the donor)

First M.I. Last Name

Mailing Address

City State Zip

Home Phone Cell Phone

Email Address

Joint Advisor (optional)

First M.I. Last Name Relationship

Mailing Address

City State Zip

Home Phone Cell Phone

Email Address



V. Your Professional Advisor:

- Accountant Attorney Financial Advisor Other: _____

First M.I. Last Name

Company Name

Address City State Zip

Phone Email

On-line access you are granting your professional advisor:

- View-only access, or Transactional access

VI. Name a Successor Advisor: A Successor Advisor takes over upon your death, incapacitation, or written release of duties as the Primary Advisor. You may add additional Successor Advisors after your application is approved by going to our website.

Successor Advisor

First M.I. Last Name Relationship

Mailing Address

City State Zip

Home Phone Cell Phone

Email Address



VII. Endow your Fund: Endowing your fund is a popular way to ensure that your wishes are honored in perpetuity. You may endow your fund when you open it or at any time, including upon your death. With an endowed fund, the assets are invested in the market and only the income is available for grantmaking.

- Endow my Fund Now** (I will make grants only from the income available on a yearly basis.)
- Endow my Fund Upon my Death** (I can make grants from the fund balance at any time. My successor/s will make grants only from the income available on a yearly basis.)

VIII. Identify a Field of Interest: Such as the arts, education, child welfare, etc. to receive grants of either a percentage or a designated amount annually upon your death or incapacitation or that of your last Successor Advisor.

Field/s of Interest - _____ % or \$_____

IX. Designate Specific Charities: One or more public charities can be identified to receive grants of either an annual percentage or a designated amount from your fund upon your death or incapacitation or that of the last Successor Advisor.

Designated Charity/ies - _____ % or \$_____



X. Our Fees and Minimums:

Application & Set-up Fee: A one-time application and set-up fee of \$500 is due upon signing this application.

- Pay with credit card online at <http://fund.us.org/ApplicationDAF>
- Deduct from initial cash contribution
- Check made payable to United Charitable with your fund name on the memo line and mailed to us at our address on this form.

Annual Administrative Fees:

Funds in cash: 1% on incoming donations
\$250 - Assessed Annually in 4th Quarter

Funds invested in the market:
Assessed bi-annually based on 12/31 and 6/30 fund balances. See below

Investment Program Fees:

Fund Balance	Fee
\$25,000 to \$500,000	1%
\$500,001 to \$1,500,000	0.85%
\$1,500,001 to \$3,000,000	0.6%
Above \$3,000,000	0.45%

Fund Minimums:

Funds in cash: No minimum
Funds invested in the market: \$25,000
Endowed Funds: \$50,000
Principal is preserved and invested for long-term; 5% annual payout

Additional charges that may apply:

- 3%** for all credit card transactions
- 2%** or \$75 (whichever is greater) to close a fund
- \$15** for expedited processing
- \$25** for domestic bank wires, erroneous or returned contributions
- \$35** for incoming checks from banks outside U.S.
- \$50** to wire funds to banks outside the U.S.



XI. Agree and Accept:

I understand that any contributions, made now or at any time in the future, once accepted by United Charitable (UC), are irrevocable and are not refundable to me or any other donor, and that United Charitable is the legal owner (right, title and interest) of the donated assets.

I understand that the Fund Advisor and Joint Fund Advisor (if named) retain advisory privileges with respect to the distribution of grants to charities as well as the investment of assets in the fund subject to UC approval. United Charitable reserves the right to reject any asset if it does not reasonably appear convertible into an income-producing asset within a reasonable timeframe, or if the asset may appear to cause a risk or liability to United Charitable.

Because the assets of each donor advised fund are legally owned and controlled by United Charitable, no person (other than specifically authorized employees of UC), is authorized to open any bank accounts, investment accounts, credit cards, merchant accounts, securities accounts, vendor accounts, trade accounts or any account whatsoever in the name of any charitable fund at United Charitable and/or in the name of United Charitable.

I have read and understand the terms and conditions described herein, and agree to the terms, conditions and fees as described.

Print Name (Primary Advisor)

Print Name (Joint Advisor, if applicable)

Authorized Signature

Authorized Signature

Date

Date

United Charitable Use Only:

Date received: _____ **Approved by:** _____ **Approval date:** _____