

Kiwanis Children's Fund Donor advised fund: Individual account application and gift agreement



Donor advised fund account name _____

Primary account holder

Mr. Mrs. Ms. Dr.

Name _____

Email address _____

Address _____

Home telephone _____

City _____

Business telephone _____

State _____ Postal code _____

Mobile telephone _____

Date of birth (MM/DD/YR) _____

Fax number _____

Secondary account holder (if applicable)

Mr. Mrs. Ms. Dr.

Name _____

Email address _____

Address _____

Home telephone _____

City _____

Business telephone _____

State _____ Postal code _____

Mobile telephone _____

Date of birth (MM/DD/YR) _____

Fax number _____

Additional advisor (as applicable)

Mr. Mrs. Ms. Dr.

Name _____

Email address _____

Address _____

Primary telephone _____

City _____

Alternate telephone _____

State _____ Postal code _____

Fax number _____

Additional advisor (as applicable)

Mr. Mrs. Ms. Dr.

Name _____

Email address _____

Address _____

Primary telephone _____

City _____

Alternate telephone _____

State _____ Postal code _____

Fax number _____

Describe your gift

Minimum initial gift: US\$10,000. Please forward this application to the Kiwanis Children's Fund with your gift of cash or readily marketable securities. If your gift consists of other assets, please send this application first so we can determine whether the assets can be accepted. Specific transfer instructions will be provided if the assets are determined to be eligible for donation. Securities held for one year or less may be income-tax deductible at cost basis only.

Amount of cash (if any) US\$_____

Checks should be made payable to the Kiwanis Children's Fund and forwarded with this application.

If your gift includes assets other than cash, please describe the assets: _____

Please indicate any restrictions in the distribution of your gift (e.g. scholarships, Kiwanis-family causes only, etc.)_____

Grant making

Once a donor advised fund account is established and the fund balance reaches at least US\$25,000, a spendable amount will be calculated for the fund and made available to grant in the subsequent fiscal year in support of Kiwanis-family causes. The annual spendable amount is determined by Kiwanis Children's Fund policy and is currently four percent of the fund's value on December 31 of the previous year.

An endowed gift of at least \$50,000 allows you to grant at least sixty percent of the annual spendable amount to Kiwanis causes. The remaining forty percent of grantable dollars may be granted to one or more non-Kiwanis organizations which qualify as 501(c)3 charitable organizations. The Kiwanis Children's Fund may require confirmation from grant recipients that all grant funds are used exclusively for charitable purposes.

There is no limit to the number of grants made from a fund, up to the total annual spendable amount. Grants may be requested for a minimum amount of \$500. Please submit a separate recommendation form for each organization to which you would like to make a grant. The Kiwanis Children's Fund retains the right to approve, reject or modify all grant recommendations.

Please be aware that the Kiwanis Children's Fund cannot honor any recommendations that satisfy an existing pledge you have made. Additionally, you may not directly or indirectly receive goods or

services, including memberships, tickets to events or other benefits, in exchange for a grant made by the donor advised fund.

Successor election

After the death, resignation, refusal, removal or inability to act of the last of the named advisor(s), any remaining fund assets shall be disposed of as follows. Undistributed assets of \$100,000 or more will be held as the _____ Trust, a permanent named fund of the Kiwanis Children's Fund. Assets less than \$100,000 will become part of the Kiwanis Children's Fund endowment.

Annual distributions from the trust will be pursuant to the Children's Fund spending policy in effect at such time, as follows:

- At least 60 percent to Kiwanis-family causes
- Up to 40 percent to the following qualified 501(c)3 charitable organization(s):

Charity name _____

Address _____

Contact name at charity _____ Phone _____

Federal tax identification number _____ Percent of grant funds _____

Charity name _____

Address _____

Contact name at charity _____ Phone _____

Federal tax identification number _____ Percent of grant funds _____

Charity name _____

Address _____

Contact name at charity _____ Phone _____

Federal tax identification number _____ Percent of grant funds _____

To establish your donor advised fund account, you must read and acknowledge the following:

I acknowledge that the Kiwanis Children's Fund will receive a fee equal to one percent of the fund's value on December 31 for managing the donor advised fund account. I acknowledge that any contribution, once accepted, is an irrevocable gift to the Kiwanis Children's Fund. I hereby certify that, to the best of my knowledge, all information presented in connection with this application is accurate, and I will promptly notify the Kiwanis Children's Fund of any changes. I acknowledge the privacy policy of the Kiwanis Children's Fund can be found online. I acknowledge that the Kiwanis Children's Fund has final authority in all investment and grant making decisions.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date written below.

Primary account holder printed name_____

Signature_____ Date_____

Secondary account holder printed name_____

Signature_____ Date_____

For the Kiwanis Children's Fund printed name_____

Signature_____ Date_____

Please mail this completed application to: Kiwanis Children's Fund
3636 Woodview Trace
Indianapolis, IN 46268

If you need assistance with this application or have any questions, please contact the Kiwanis Children's Fund at +1-317-217-6159 or via email at grants@kiwanis.org.

