



DONOR-ADVISED FUND

Donor Application

The Donor-Advised Fund is your own charitable fund set up for the purpose of making grants to organizations about which you care. Organizations to which you may give must be qualified as charitable by the IRS. The Donor-Advised Fund is usually established inside a Community Foundation that invests the funds for tax-free growth.

FIRST DONOR

Full Name: Mr. Ms. _____

Date of Birth: _____ Social Security: _____

Religious Affiliation: Lutheran Other If other, please specify: _____

First Donor's Primary Address:

Street: _____ City/State/ZIP: _____

Business Phone: _____ Home Phone: _____

Cell #: _____ Email: _____

SECOND DONOR

Full Name: Mr. Ms. _____

Date of Birth: _____ Social Security: _____

Religious Affiliation: Lutheran Other If other, please specify: _____

Second Donor's Primary Address:

Street: _____ City/State/ZIP: _____

Business Phone: _____ Home Phone: _____

Cell #: _____ Email: _____

Alternate Address: (if applicable)

Street: _____ City/State/ZIP: _____

Business Phone: _____ Home Phone: _____

Cell #: _____ Email: _____

Additional Contacts: (those authorized to discuss your gift with Foundation staff)

Financial Advisor: _____ Phone/Email: _____

Attorney: _____ Phone/Email: _____

Accountant: _____ Phone/Email: _____

Other: _____ Phone/Email: _____

NAME OF FUND

As the fund donor you have the privilege of naming your fund. You may name it for yourself, your family, or someone else. Please write the name of your charitable fund below:

PURPOSE OF THE FUND

For more information about the purpose of your fund see, "Must I write a Fund Purpose?" in *The Companion to The Donor Advised Fund*.



PROFESSIONAL ADVICE

A Donor-Advised Fund (Fund) may be established without the advice of an attorney, accountant, or financial planner. Please call Lutheran Legacy Foundation before choosing this option.

Lutheran Legacy Foundation encourages advisement of an attorney for the following reasons:

- 1) The Fund may be part of an estate plan.
- 2) The organizations you choose to support must be verified as charitable. If you do not have the required information Lutheran Legacy Foundation will help you obtain it, or an attorney may perform this function.
- 3) Upon the death of a Fund advisor an attorney is valuable for notifying and establishing a successor advisor.

TERM OF ADVISEMENT

As the donor advisor(s), you have the right to (but do not have to) name a successor advisor who will take your place on your death. Check one of the following:

- For my life. For my life and the life of my spouse (until the second shall die).
- Until the last survivor dies among me, my spouse, my children and/or grandchildren, or non-family member named below. (Please also include the Social Security number for each successor. If you name more than one successor advisor, please circle the name of the individual nominated to act as chairperson of the successor advisors.)

Address and telephone number of the chairperson of the successor advisors:



DISCLOSURE

I hereby give permission to have the name and purpose of my fund disclosed in Lutheran Legacy Foundation, Inc. publications. Yes No

I wish to have the name of my fund disclosed to benefiting charities. Yes No

ASSETS

Please indicate the amount of your monetary charitable gift: _____

Charitable gifts may be made using a variety of different assets. Contact Lutheran Legacy Foundation if you would like to donate through other assets such as securities, real estate, life insurance, etc.

GIFT ACKNOWLEDGEMENT

I hereby acknowledge that I intend to make an irrevocable gift to the Lutheran Legacy Foundation, Inc. as described in this application.

With my gift, I understand that I will be transferring all ownership and legal control to the Foundation, subject to normal acceptance by an officer of the Foundation, for allocation to a permanent charitable fund at the Foundation. I understand that grants from the fund will be distributed to IRS-qualifying charities in accordance with my wishes, subject to Foundation policies.

Donor's Signature

Date

Donor's Signature

Date

PROPER CONSIDERATION

The assets used to establish your endowment are tax deductible. Therefore, they are non-refundable. Please consider whether or not your gift will cause you financial hardship. The Foundation encourages you to consult with your financial advisor to make sure this is not the case.

To the best of my knowledge this donation will not cause financial hardship.

Donor's Signature

Date

Donor's Signature

Date

SEND YOUR FUND APPLICATION

Once your Fund Application is completed, please send, fax, or email it to the Foundation. A final Fund Agreement will be sent to you.

Mailing address: LUTHERAN LEGACY FOUNDATION, Inc.
P.O. Box 31
Paris, IL 61944

Office phone: 217-463-8202

E-mail: llf@lutheranlegacyfoundation.org