



Agency Fund Application
Traditional Fund

YOUR CONGREGATION/ORGANIZATION:

Name: _____

Religious Affiliation: LCMS ELCA WELS Other: _____

Organization's Tax ID Number: _____

Organization Address: _____

City: _____ State: _____ ZIP: _____

Telephone: (____) _____ Fax: (____) _____

E-mail: _____

FUND NAME: _____

FUND PURPOSE: *(There may be more than one purpose. The purpose may be general or specific. Part of the fiduciary duty of the LLF is to determine that disbursements are made according to the purpose of the fund.):*

Initial Gift Amount: \$ _____

Notes:

DISCLOSURE IN FOUNDATION PUBLICATIONS:

From time to time, the Foundation publishes information about funds that have been established. Foundation publications include an annual report, newsletters, brochures and other written material, plus its Web site. Please indicate below whether or not you permit your fund to be recognized in Foundation publications. If no box is checked, the Foundation assumes the organization wishes to remain anonymous in Foundation publications.

We authorize the Lutheran Legacy Foundation to publicize our fund by its fund name in Foundation publications.

GOVERNING COMMITTEE OF THE FUND*:

Name of the Governing Committee:

List all members of the Committee: _____

Name, address, and phone number of Committee contact person:

Alternate contact person, address, and phone number:

How is the governing body chosen?

**It is the responsibility of the Organization to notify the Lutheran Legacy Foundation when changes in the Governing Committee are made.*

DISTRIBUTION INSTRUCTIONS:

Choose option one or two.

1. Check here to receive distributions on a regularly scheduled basis. ____

Distribution Percentage ____%. (For the long-term sustainability of the Fund it is recommended that the regularly scheduled distribution not be in excess of 4%.)

(check one)

Send the regularly scheduled distribution Annually____ Semi-annually____

Or

2. Check here to receive distributions at the request of your Governing Committee____

THE STATEMENTS BELOW APPLY TO OPTIONS ONE AND TWO. YOU MUST CHECK ONE.

____Do not allow a distribution that would cause the Fund balance to fall below the principal amount.

____The Fund balance may fall below the principal amount.

CONTINGENT CHARITABLE BENEFICIARY:

Please indicate how your fund is to be directed should you lose your tax-exempt status or are no longer a viable organization by selecting one of the following options. If no box is checked, the Foundation assumes your selection to be to the LLF Community Fund.

To be contributed to the LLF Community Fund

To be contributed to a Lutheran Field of Interest (name field(s) of interest):

To be contributed to a specific Lutheran organization as an endowment in LLF (name organization):
