



DONOR ADVISED FUND APPLICATION AND AGREEMENT

- *Mail or fax completed form to:
Significance Foundation,
610 West Azele Street, Suite 203
Tampa, FL 33606
Fax (619) 232-8197. If faxed, please also mail originals to Significance Foundation*
- *Should you have any questions, please contact a Donor Relations Specialist at (888) 488-1288*

I. Donor Advised Fund Name

Please select a name for this Donor-Advised Fund, such as the “Smith Family Fund.” The name need not identify the donor by name and may identify the fund’s main purpose. A letter acknowledging the Fund accompanies each gift, unless anonymity is requested when making a gift recommendation.

Fund Name _____

II. Donor-Advisor Information

There may be up to two named Donor-Advisors for each Fund, each with full and equal rights to make contributions, recommend gifts and name successors. If there is more than one mailing address, all Fund correspondence will be sent to “Donor-Advisor One”.

Donor-Advisor One

Name _____

Street Address _____

City, State, Zip, Country _____

Telephone () _____ Day, () _____ Evening

Fax () _____ Email _____

Date of Birth (MM/DD/YYYY) _____

Social Security Number _____

Donor-Advisor Two

Name _____

Street Address _____

City, State, Zip, Country _____

Telephone () _____ Day, () _____ Evening

Fax () _____ Email _____

Date of Birth (MM/DD/YYYY) _____

Social Security Number _____

III.SUCCESSOR INFORMATION

Donor-Advisors have the option, upon death, incapacity, or other disqualification of both named Donor-Advisors to the fund, of allocating a percentage of the remaining assets among the following options. If no selection is made, the remaining assets in the Fund will be disbursed at the discretion of the Significance Foundation. Your selection may be changed at any time using the *Successor Advisor* form available on the Foundation’s website. Please select any combination of the following as beneficiaries. Percentages are of fund value and must total 100%

Significance Foundation General Fund _____%

Other Charitable Organization
_____%

Donors may recommend a qualified Section 501(C)(3) to receive the remaining proceeds of the Fund or a portion thereof. All recommendations of charitable beneficiaries are subject to the approval of Significance Foundation Board, in accordance with its gift making policies, at the time the gift would take effect.

Organization _____

Street Address _____

City, State, Zip, Country _____

Telephone () _____ Fax () _____

Email _____ Website _____

Individual(s) as Successor Donor-Advisors

Donors may name up to two individuals as Successor Advisors to the account with full rights as Donor-Advisors.

Successor Donor-Advisor - One _____%

Name _____

Street Address _____

City, State, Zip, Country _____

Telephone () _____ Day, () _____ Evening

Fax () _____ Email _____

Successor Donor-Advisor - Two _____%

Name _____

Street Address _____

City, State, Zip, Country _____

Telephone () _____ Day, () _____ Evening

Fax () _____ Email _____

Total Percentages Must Equal 100%

IV. CONTRIBUTION DESCRIPTION

Check or Money Order enclosed payable to Significance Foundation \$ _____

Domestic Wire Transfer \$ _____

Please contact the Significance Foundation for wire transfer instructions

Other Gifts

To discuss contributions of Publicly Traded Stock, Real Estate, Life Insurance and personal property or other assets, please contact:

Significance Foundation
Jo Ann Platt, Chief Operating Officer
(888) 488-1288
jplatt@significancefoundation.org

V. TERMS OF THE AGREEMENT

I (We) hereby request that the Significance Foundation establishes a Donor-Advised Fund (the Fund) on its books as specified in this Application. The Significance Foundation will apply the assets in the Fund toward the achievement of its charitable

purposes as provided in the Articles of Incorporation. I understand that any contribution, once accepted by the Significance Foundation, represents an irrevocable contribution to the Significance Foundation and is not refundable to me for any reason.

I agree to read and be bound by the terms and conditions specified in the Significance Foundation *Donor-Advised Fund Guide* as currently in effect and as amended from time to time. If I do not receive or understand the Guide, I will notify the Significance Foundation. I understand that it is my right and responsibility to consult with my attorney and/or financial professional regarding the terms of this agreement.

I understand that I may make recommendations to the Significance Foundation about charitable beneficiaries and that these recommendations are advisory and not binding. The Significance Foundation offers a range of gift making options and I understand that there may be program service fees for each. As required by law, the Significance Foundation may make or withhold any distribution from the Fund at its sole discretion and is not bound by donor recommendations. I understand that I may not make any recommendations for distributions from the Fund that will satisfy any personal obligation or pledge or confer any other economic benefit upon me or any member(s) of my family.

The administrative fee for each Donor-Advised Fund of the Significance Foundation presently is 1% per annum of the Fund's assets with a minimum of \$550 per year and a maximum of \$5,000 per year. This fee covers the accounting and reporting associated with the Fund and other general and administrative costs of the Significance Foundation. This Significance Foundation reserves the right to adjust this schedule at any time without notice.

If there is more than one Donor-Advisor to this Fund, each Donor-Advisor has the authority, acting individually and without notice to any other Donor-Advisor, to make recommendations to Significance Foundation as fully and completely as if the Donor-Advisor is the sole Donor-Advisor and may make any changes to the Fund (except to remove the other Donor-Advisor(s) to the Fund).

I understand that all assets of the Significance Foundation will be held and used as provided in its governing documents, as those documents may be amended from time to time, and as required by federal and state laws governing charities. Significance Foundation's programs are subject to all applicable state and federal laws, and regulations. I hereby certify that, to the best of my knowledge, all information represented in connection with this application is accurate and I will promptly notify Significance Foundation in writing of any changes. This document replaces all previous documents, agreements or understandings.

Signature of Donor-Advisor _____ *Date* _____

Signature of Donor- Advisor _____ *Date* _____

Significance Foundation Acceptance

Date