



DONOR APPLICATION FORM

PROPOSED NAME OF ACCOUNT

(e.g. The John and Mary Davis Family Foundation, The Davis Giving Account, The John and Mary Davis Fund, etc.)

DONOR INFORMATION

Donor 1 Name

Donor 2 Name

Street Address

Street Address

City, State, ZIP

City, State, ZIP

Phone Number

Phone Number

Email Address

Email Address

Date of Birth

Social Security Number

Date of Birth

Social Security Number

Identification Type (driver's license, passport, etc.)

Identification Type (driver's license, passport, etc.)

Identification Number

Identification Number

Issuer

Issuer

Expiration Date

Expiration Date

TYPE OF ACCOUNT

- Donor Advised Fund** – donors can recommend grants to a wide variety of IRS-qualified charitable organizations.
- Specific Purpose Fund** – supports a specific charitable organization or specific charitable cause; a specific purpose fund cannot be changed after it is established.
- Endowment Fund** – invested to keep the principal intact while paying out a portion of the income annually to the designated charitable organization(s).



FUNDING THE ACCOUNT

- Initial cash gift in the amount of \$_____ (make check payable to *GuideStream Donor Advised Funds*).
- Initial non-cash gift estimated to be worth \$_____. Describe the asset below (e.g. stock, real estate, etc.).

INVESTMENT OF ASSETS

GuideStream Donor Advised Funds is responsible for the investment of all donated assets and uses an investment model based on time horizon for each account. Although your fund is not a self-directed account, we desire your input to find the right investment model for you. To asset with proper asset allocation, please provide the following information:

- What is the time horizon for this account? **Months** **Years** **Perpetuity** **Other:** _____
- Do you plan to make additional gifts to the fund? **YES** **NO** If yes, how often? _____
- Please describe the anticipated frequency and dollar amount of grant recommendations (if known):

STATEMENTS

Statements are sent annually unless otherwise requested. Please indicate the address where statements should be sent:

- Donor 1 Address Donor 2 Address Other address: _____

Name _____

Street Address or PO Box _____

City, State, ZIP _____

ONLINE ACCESS

Please set up online access to view transactions and statements for this account: **YES** **NO**

OTHER ACCOUNTS

Please indicate if you have any of the following accounts:

- GuideStream Financial Free Methodist Investment and Loan Fund FM Financial Managed Account



FUND SUCCESSION PLAN

Your account at GuideStream Donor Advised Funds can continue to tell your story and meet the needs of qualified charitable organizations even after you pass away. Please **choose one of the three options below** for the remaining funds in your account (and any funds designated to your account through your estate plan) upon the death of all donors. If you want to discuss an alternate plan for your account, please contact GuideStream Donor Advised Funds at 800-325-8975 or info@guidestreamdaf.org. Alternate succession plans require approval.

This section is not applicable to endowment funds. The fund declaration will contain details for continuation in perpetuity.

OPTION 1:

Distribute all remaining funds to the following qualified charitable organizations in the stated percentages (attach additional sheets if needed):

Name of Organization 1: _____

Specific Designation (if any): _____

Mailing Address: _____

Phone Number: _____ Percent of Account: _____

Name of Organization 2: _____

Specific Designation (if any): _____

Mailing Address: _____

Phone Number: _____ Percent of Account: _____

Name of Organization 3: _____

Specific Designation (if any): _____

Mailing Address: _____

Phone Number: _____ Percent of Account: _____

Name of Organization 4: _____

Specific Designation (if any): _____

Mailing Address: _____

Phone Number: _____ Percent of Account: _____

OPTION 2:

Continue the existing recurring distributions for my account at the time of my death until all funds are distributed. PLEASE NOTE: if there are no existing recurring distributions at the time of your death, the GSDAF board will make the final determination for distribution of the account.

