Kiwanis International Foundation

Donor Advised Fund
Individual Account Application and Gift Agreement

Please indicate the name of the Donor Advised Fund ("DAF") account:

_____

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

☐ 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_____

Describe Your Gift

Minimum initial gift: $10,000. Please forward this application to the Kiwanis International Foundation with your gift of cash or readily marketable securities. If your gift consists of other assets, then 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) $_____ Checks should be made payable to the Kiwanis International Foundation and forwarded with this application.

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

_____

If there are restrictions in the distribution of your gift, please indicate (i.e. Scholarships, Kiwanis family causes only, etc.)_____

_____

_____

Grant Making

Once a DAF account has been established and funds total at least $25,000 you may recommend grants to qualified charitable organizations. 60% is to be granted to Kiwanis causes and the remaining 40% of grantable dollars can be made to other 501(c)3 organizations. Please be aware that the Kiwanis International Foundation 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 fundraisers or other benefits, in exchange for a grant made by the DAF. The Kiwanis International Foundation may require confirmation from grant recipients that all grants are used exclusively for charitable purposes. The Kiwanis International Foundation retains the rights to approve, reject or modify all grant recommendations.

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, if $100,000 or more, will be held as the _____Trust, a permanent named fund of the foundation. Distributions from the trust will be pursuant to the foundation's spending policy to the following nonprofit agency/ies:

60% to Kiwanis-family causes

40% to _____

Note: Assets less than $100,000 will become part of the foundation's endowment.

Before your DAF account can be established, you must read and acknowledge the following:

I acknowledge that the Kiwanis International Foundation will receive a 1% annual fee for managing the DAF account. I acknowledge that any contribution, once accepted, is an irrevocable gift to the Kiwanis International Foundation Donor Advised 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 International Foundation Donor Advised Fund of any changes. I acknowledge the privacy policy can be found online. I acknowledge that the Kiwanis International Foundation has final authority in all investment and grant making decisions.

Signature:_____Date:_____

Signature:_____Date:_____

Signature:_____Date:_____
(representative of the Kiwanis International Foundation)

For assistance, please call Matt Morris at +1-317-217-6234

Please mail this completed application to: **Kiwanis International Foundation**
3636 Woodview Trace
Indianapolis, IN 46268