



CHURCH OF THE NAZARENE FOUNDATION

17001 Prairie Star Pkwy, Ste. 200
Lenexa, KS 66220
(913) 577-2983

DONOR-ADVISED FUND APPLICATION

Donor #1

Full Name _____

Street Address _____

City, State, Zip _____

Home Phone _____ Cell Phone _____

Email _____

I would like to receive statements via: Online portal Mail

Donor #2

Full Name _____

Street Address _____

City, State, Zip _____

Home Phone _____ Cell Phone _____

Email _____

I would like to receive statements via: Online portal Mail

Name of Fund

You may choose to name your fund. (E.g. Williams Family Charitable Fund. Grants made from your fund will include your fund name unless anonymity is requested.)

Donor-Advised Fund Name

Source of Donation (Check One): Gift made during life Testamentary gift

Initial Contribution (Check One)

(There is a \$5,000 minimum starting amount for all Donor-Advised Funds)

- I am enclosing a check payable to Church of the Nazarene Foundation in the amount of \$ _____.
- I am initiating a wire to the Church of the Nazarene Foundation in the amount of \$ _____.
- I wish to donate non-cash property and request that someone from the Foundation call me.

Asset Allocation Selection (See asset allocation models document for further details on investment options)

| | |
|---|--|
| <i>Choose one:</i> | |
| <input type="checkbox"/> All Fixed Income | <input type="checkbox"/> Growth & Income |
| <input type="checkbox"/> High Income | <input type="checkbox"/> Growth |
| <input type="checkbox"/> Income | <input type="checkbox"/> Aggressive Growth |
| <input type="checkbox"/> Income & Growth | <input type="checkbox"/> Aggressive |

Successor Advisors *(If you wish, you may choose to name successor advisors)*

Name: _____ Phone: _____ Email: _____

Address: _____

Name: _____ Phone: _____ Email: _____

Address: _____

I hereby irrevocably give the property described in this application and its attachments to the Church of the Nazarene Foundation to establish a Donor-Advised Fund (i.e. for current gifts).

NO RETURN BENEFIT. Donor understands that, under the laws governing charities, neither the Donor nor any other person may receive any tangible benefit or privilege in return for a distribution from this Donor-Advised Fund. The Donor will not recommend any distribution from the Fund that will satisfy any personal economic obligation or pledge or confer any other economic benefit upon the Donor, the Donor's family, or any enterprise related to the Donor.

ADMINISTRATIVE FEE. The Church of the Nazarene Foundation applies an annual administrative fee of 1.25% of the Donor-Advised Fund balance.

GOVERNING DOCUMENTS; APPLICABLE LAW. All assets of the Church of the Nazarene Foundation, including assets held as a Donor-Advised Fund, 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 Kansas laws governing charities.

Donor Signature(s) and Date

Signature: _____ Date: _____

Signature: _____ Date: _____