



## Group Account Application

Please indicate the name of Donor Advised Fund (“DAF”) account, as you would like it to appear on correspondence and checks: \_\_\_\_\_

### Primary Account Holder

Mr.    Mrs.    Ms.    Dr.

Name \_\_\_\_\_ Home Telephone \_\_\_\_\_

Address \_\_\_\_\_ Business Telephone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Mobile Telephone \_\_\_\_\_

Email address \_\_\_\_\_ Fax Number \_\_\_\_\_

Date of Birth (MM/DD/YEAR) \_\_\_\_\_

### Additional Account Holders

Mr.    Mrs.    Ms.    Dr.

Name \_\_\_\_\_ Home Telephone \_\_\_\_\_

Address \_\_\_\_\_ Business Telephone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Mobile Telephone \_\_\_\_\_

Email address \_\_\_\_\_ Fax Number \_\_\_\_\_

Date of Birth (MM/DD/YEAR) \_\_\_\_\_

Mr.    Mrs.    Ms.    Dr.

Name \_\_\_\_\_ Home Telephone \_\_\_\_\_

Address \_\_\_\_\_ Business Telephone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Mobile Telephone \_\_\_\_\_

Email address \_\_\_\_\_ Fax Number \_\_\_\_\_

Date of Birth (MM/DD/YEAR) \_\_\_\_\_

Mr.    Mrs.    Ms.    Dr.

Name \_\_\_\_\_ Home Telephone \_\_\_\_\_

Address \_\_\_\_\_ Business Telephone \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Mobile Telephone \_\_\_\_\_

Email address \_\_\_\_\_ Fax Number \_\_\_\_\_

Date of Birth (MM/DD/YEAR) \_\_\_\_\_

## Describe Your Gift

*Minimum initial gift: \$10,000.* Please forward this application to The Rotary Foundation DAF 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 Rotary Foundation and forwarded with this application .

If your gift includes assts other than cash, please describe the assets:\_\_\_\_\_

\_\_\_\_\_

## Grant Making

Once a DAF account has been established and funded, you may recommend grants to qualified charitable organizations. Please be aware that The Rotary 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 Rotary Foundation may require confirmation from grant recipients that all grants are used exclusively for charitable purposes. The Rotary Foundation retains the right to approve, reject or modify all grant recommendations.

## Successor Election

Group DAF accounts are intended to continue in perpetuity and therefore cannot designate a successor. If a Group DAF account is terminated, The Rotary Foundation will liquidate the remaining shares in the account and distribute the proceeds to The Rotary Foundation's Permanent Fund.

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

I acknowledge that I have read The Rotary Foundation Donor Advised Fund Program Circular and agree to the terms and conditions described therein. I acknowledge that any contribution, once accepted, is an irrevocable gift to The Rotary 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 Rotary Foundation Donor Advised Fund of any changes. I acknowledge the privacy policy can be found online. I acknowledge that The Rotary Foundation has final authority in all investment and grant making decisions.

Signature:\_\_\_\_\_ Date:\_\_\_\_\_

Signature:\_\_\_\_\_ Date:\_\_\_\_\_

Signature:\_\_\_\_\_ Date:\_\_\_\_\_

Signature:\_\_\_\_\_ Date:\_\_\_\_\_

Mail this completed application to:

**Rotary DAF  
c/o NRS  
4A Gill Street  
Woburn, MA 01801**