



The Rotary Foundation Donor Advised Fund

Group Application

Account Holders (minimum of 2; maximum of 4)

Mr. Mrs. Ms. Dr.

Name: _____ Social Security Number: _____ - _____ - _____
Address: _____ Office Telephone: _____
City: _____ Fax number: _____
State: _____ Zip Code: _____ Home telephone: _____
E-mail Address: _____ Date of Birth: _____ (MM/DD/YEAR)

Mr. Mrs. Ms. Dr.

Name: _____ Social Security Number: _____ - _____ - _____
Address: _____ Office Telephone: _____
City: _____ Fax number: _____
State: _____ Zip Code: _____ Home telephone: _____
E-mail Address: _____ Date of Birth: _____ (MM/DD/YEAR)

Mr. Mrs. Ms. Dr.

Name: _____ Social Security Number: _____ - _____ - _____
Address: _____ Office Telephone: _____
City: _____ Fax number: _____
State: _____ Zip Code: _____ Home telephone: _____
E-mail Address: _____ Date of Birth: _____ (MM/DD/YEAR)

Mr. Mrs. Ms. Dr.

Name: _____ Social Security Number: _____ - _____ - _____
Address: _____ Office Telephone: _____
City: _____ Fax number: _____
State: _____ Zip Code: _____ Home telephone: _____
E-mail Address: _____ Date of Birth: _____ (MM/DD/YEAR)

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



The Rotary Foundation Donor Advised Fund

Describe Your Gift

Minimum initial gift: \$20,000. 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 DAF and forwarded with this application.

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

Grant Making

We welcome your recommendations for grants to charitable organizations and about the timing of the grants. Once your DAF account has been established and funded, you will be provided grant recommendation forms. Please be aware that The Rotary Foundation cannot honor any recommendations that an account holder makes for grants that satisfy an existing pledge of the account holder(s). Additionally, an account holder may not directly or indirectly receive goods or services, including memberships, tickets to fundraisers or other benefits, in exchange for the grant recommendation. The Rotary Foundation may require confirmation from grant recipients that all grants are used exclusively for charitable purposes.

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 the 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/or 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 that The Rotary Foundation has final authority in all investment and grant making decisions.

Signature: _____ Date: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Mail this complete application to:

The Rotary Foundation Donor Advised Fund
P.O. Box 15203
Albany, NY 12212-5203

Deliver overnight packages to:

The Ayco Company
c/o Brian DeSilva, Manager
25 British American Blvd.
Latham, NY 12110