



## Individual Account Application

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

Please indicate how you would like your name(s) to appear in the grant letters to charitable organizations, for acknowledgements and other relevant publications:  
\_\_\_\_\_

### Account Holder(s) Information

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:\_\_\_\_\_

Mail this completed application to:

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

## Grant Making

We welcome your recommendations for grants to 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. The Rotary Foundation retains the right to approve, reject or modify all grant recommendations.

## Successor Election

At the termination of the DAF account, 50% of the value will be transferred to The Rotary Foundation's Permanent Fund. The value of the fund is determined on the date of death of the account holder or surviving spouse, when applicable, or after any testamentary contributions have been added to the account. For accounts under \$150,000 the remaining 50% can be distributed to any IRS-approved charitable organization, including The Rotary Foundation. For accounts over \$150,000, the remaining 50% may remain in the DAF for the donor's successor child(ren) or be distributed to organizations, as described in greater detail in The Rotary International Donor Advised Fund Program Circular. Please indicate your choices below:

Successor	Complete Address	Comments/ Restrictions	Percent Min-Max	If less than \$150,000	If more than \$150,000
The Rotary Foundation of Rotary International	One Rotary Center, 1560 Sherman Ave Evanston, IL 60201	Must be at least 50%	50-100%		
Organization Name: _____ _____	_____ _____	Must be an IRS- approved charitable organization.^	0-50%		
Organization Name: _____ _____	_____ _____	Must be an IRS- approved charitable organization.^	0-50%		
Approved successor(s): _____ _____	_____ _____	Approved successors are donor's children.^	0-50%	Not applicable	
		^Please use additional copies of this page as needed.	EACH COLUMN MUST TOTAL 100%	_____%	_____%

**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: \_\_\_\_\_