



# THE DONOR-ADVISED FUND of The Virginia Baptist Foundation

## DONOR ADVISOR CONTRIBUTION AGREEMENT / APPLICATION

Please complete the following form and mail it to us with your initial contribution. The Donor-Advised Fund of The Virginia Baptist Foundation will notify you when your named account has been established and provide you with a receipt for income tax purposes.

**DONOR-ADVISOR INFORMATION:** The Donor-Advisor of an account has full and equal rights to recommend charitable disbursements from the named account and to elect successors of the account. All account correspondences will be sent to the Donor-Advisor.

Name \_\_\_\_\_

Address \_\_\_\_\_ Email \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_ Mobile \_\_\_\_\_

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### Name Your Account

As Donor-Advisor you have the right of naming your account. Disbursements made from the account to a charitable organization are accompanied by a letter, which includes your account name (unless the Donor-Advisor specifies anonymity). An account number will be assigned to your account once your account has been funded. The Donor-Advisor will receive a quarterly account statement in January, April, July, and October of each calendar year.

\*Account Name \_\_\_\_\_

\*Please limit account name to forty (40) characters

### Contributions

The minimum amount for initial gifts is \$5,000.00. Additional gifts to your named account will be accepted in increments of \$1,000.00. To donate property or other qualified assets, please contact the trustee to receive further instructions.

Cash Gift Amount \_\_\_\_\_

(Checks must be made payable to The Donor-Advised Fund of the Virginia Baptist Foundation)

### Securities:

Issuer(s) \_\_\_\_\_

Number of Shares/Certificates \_\_\_\_\_ I have enclosed the physical certificates.

Approximate Market Value \_\_\_\_\_

(Please call the Virginia Baptist Foundation, Inc. at (804) 672-8862 or (800) 868-2464 to receive further instructions.) Please note that the value of the tax deduction for contributions of securities held for one year or less may be based on the lesser of their cost basis or fair market value.

### Investment Fund Selection

As Donor-Advisor you may select one investment fund (depending on your level of risk tolerance), or allocate your gift among a combination of the funds. I acknowledge having received a prospectus for each of the respective funds.

\_\_\_\_\_ Washington Mutual Investors Fund + Percentage of Total: \_\_\_\_\_%

\_\_\_\_\_ The Income Fund of America + Percentage of Total: \_\_\_\_\_%

\_\_\_\_\_ The Bond Fund of America + Percentage of Total: \_\_\_\_\_%

Total: 100%

+Please designate percentages in increments of 10%

OVER >

## Distributions from the Account

As Donor-Advisor you can recommend that a disbursement be made from your named account, specifying the charitable recipient, the dollar amount and the investment fund(s) from which the disbursement should be made. The Donor-Advisor Fund of The Virginia Baptist Foundation has the final authority over the distribution and must review and approve all disbursement recommendations. If the recipient organization does not receive approval, the Trustee will contact you to request an alternative recommendation. Disbursements can only be made to the following organizations:

- Organizations that qualify as tax-exempt under Section 170(c) of the Internal Revenue Code.
- Nonprofit organizations that are public charities as defined by Sections 509(a) of the Internal Revenue Code.

IRS regulations forbid disbursements that would benefit the Donor-Advisor, private foundations, or specific individuals. Disbursements cannot be made for lobbying purposes or to support political campaigns. Proposed disbursement must be equal to or less than the balance in your account.

(Note: Internal revenue service regulations require annual disbursements of at least 5% of fund net assets. Disbursement inactivity on the part of the Donor-Advisor will necessitate the Trustee of the account transferring up to 5% of assets from the Donor-Advisor's named account to The Virginia Baptist Foundation Endowment Fund.)

## Successor Election

As Donor-Advisor you may designate a representative to succeed you on your named account. You may change this designation at any time via written request to the Donor-Advised Fund of The Virginia Baptist Foundation. Upon the notification of your death or incapacity, the below-named individual(s) is/are to succeed the Donor-Advisor:

Name \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Business Phone \_\_\_\_\_ Mobile \_\_\_\_\_

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Relationship to Donor-Advisor \_\_\_\_\_

### **Signature: A Donor-Advisor must sign this section before a new account can be established.**

I hereby transfer as an irrevocable gift the property described above in order to establish a donor-advisor account with the Donor Advised Fund of The Virginia Baptist Foundation. I understand that my charitable income tax deduction will be based on my contributions only. I will not receive any additional deductions for disbursements to charity from the account. I acknowledge that I have read the Donor-Advised Fund booklet and agree of its terms and conditions. I hereby certify that, to the best of my knowledge, all information presented in connection with the Agreement is accurate, and I will notify the Donor-Advised Fund of The Virginia Baptist Foundation promptly of any changes. I represent that I have authority to make this gift and execute the Gift Agreement.

Signature of Donor-Advisor \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Signature of Successor Advisor \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Please return this complete application to:



**THE DONOR-ADVISED FUND**  
of The Virginia Baptist Foundation

2828 Emerywood Parkway, Richmond, VA 23294  
804.672.8862 · 800.868.2462 · fax 804.672.3747 · tfuller@vbfinc.org