



THE DONOR-ADVISED FUND of The Virginia Baptist Foundation

TESTAMENTARY CONTRIBUTION APPLICATION

Please complete the following form and mail it to us by the time you execute your will, making a testamentary charitable gift through the Donor-Advised Fund of The Virginia Baptist Foundation. The Donor Advised Fund will notify you when your testamentary account has been established.

DONOR ADVISOR INFORMATION

The Testator/Donor Advisor of an account has the right to recommend post mortem charitable disbursements from the named account in accordance with the testator's will and this application. All account correspondence will be sent to the Donor Advisor or his estate.

Name _____

Address _____ Email _____

City _____ State _____ ZIP _____

Home Phone _____ Business Phone _____ Mobile _____

Social Security # _____ Date of Birth ____/____/____

Name Your Account

As a Testamentary Donor Advisor, you have the right of naming your account. Future disbursements made from the account to a charitable organization will be accompanied by a letter, which will include the account name (unless the Donor Advisor specifies anonymity). An account number will be assigned to your account once your account has been funded. Once the account is funded, the Donor Advisor's estate 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

Please describe the gift(s) to your account which you have made by your will. Please also enclose a copy of your will, so that we may have a record of the testamentary gift you have made:

Cash: _____

Securities:

Issuer(s) _____ Number of Shares/Certificates _____

Approximate Market Value _____

Other property (please describe): _____

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 available funds. I acknowledge having received a prospectus for each of the respective funds.

___ Washington Mutual Investors Fund (Equity Fund) +Percentage of Total: _____%

___ The Income Fund of America (Balanced Fund) +Percentage of Total: _____%

___ The Bond Fund of America (Fixed Income Fund) +Percentage of Total: _____%

+ Please designate percentages in increments of 10%

Distributions from the Account

As a Testamentary Donor Advisor, you can recommend that a post-mortem 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 Advised Fund of The Virginia Baptist Foundation has the final authority over the distribution and must review and approve all disbursement recommendations. 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 Section 509(a) of the Internal Revenue Code.

IRS regulations forbid disbursements that would benefit the Donor Adviser, 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 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.)

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

Under my will, I have made a testamentary gift the property described above in order to establish a donor advised account with the Donor Advised Fund of The Virginia Baptist Foundation. I understand that my estate's charitable income tax and/or estate 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 to its terms and conditions. I hereby certify that, to the best of my knowledge, all information presented in connection with this 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 the authority to make this gift and execute the Gift Agreement.

Signature of Testamentary Donor Advisor _____

Date ____/____/____

Please return this complete application and a copy of your Will 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