

CNCF Donor Advised Giving Fund Application

Please complete the following application to establish a **CNCF Giving Fund** (donor advised) with the Canadian National Christian Foundation (CNCF). For complete policies and fund information, read CNCF's Donor Advised Funds Policies and Guidelines at www.cncf.ca. If you need assistance, please call 1-866-336-3315 or simply email info@cncf.ca.

1. GIVING FUND INFORMATION

FUND NAME

What would you like to name this fund? _____

For example: The Smith Family Giving Fund, or the John 3:16 Fund, or The First Church Fund, etc. The fund name and your name will appear on all fund correspondence, as well as all correspondence that accompanies any grants (distributions) from the fund, unless you request anonymity.

FUND TYPE

Circle One: Individual Family Ministry Church Company

If this fund is being established by a church or ministry, list its name here: _____

2. DONOR CONTACT INFORMATION

DONOR 1

Mr./Mrs. First Name Initial Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

DONOR 2 (Joint Fund Holder*? yes no)

Mr./Mrs. First Name Initial Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

* Each donor is also an advisor of the Giving Fund . In the case of a Joint Fund, CNCF will require the signatures of all Advisors for any distribution recommendations. If this is not a Joint Fund, CNCF will receive instructions from any individual Advisor.
To add additional Advisors, please provide the same contact information requested above for each on a separate sheet.

3. CONTRIBUTION INFORMATION

The suggested opening balance for a CNCF Giving Fund is a minimum of \$5,000 to be received by CNCF within 30 days of submission of this application. Additional contributions to the giving fund must be valued at a minimum market value of \$2,000 each. Please use the “CNCF Contribution Form” for each donation as found on our homepage at www.cncf.ca.

Please check off the type of contribution you will be making:

- A cheque in the amount of \$ _____ (Cheques should be made out to “Canadian National Christian Foundation”)
- Publicly traded securities or mutual fund shares
Name of stock or mutual fund: _____
Approximate value: \$ _____
Number of shares: _____ (To initiate the transfer, please use the Securities Transfer Form available as a download from the homepage at www.cncf.ca, or contact us.)
- A non-liquid gift (Please contact CNCF for more information.)

Contributions to the Giving Fund are irrevocable and non-transferable. As required by law, all such funds are the property of CNCF and CNCF retains full and unlimited control of them. CNCF will use its best efforts to efficiently and effectively make grants to the donees chosen by Giving Fund advisor(s).

4. INVESTMENT INFORMATION

Contributions to a Giving Fund will be held as cash in an interest earning savings account and will be withdrawn from there as CNCF receives distribution advice from the Giving Fund Advisor(s). Interest earned will be credited to the Giving Fund on a monthly basis.

5. SUCCESSOR ADVISOR INFORMATION

In the event of your death or incapacity, or the termination of your organization, you may wish to provide CNCF with a “succession plan” for the Giving Fund you have established, particularly if there is presently only one named Advisor (as outlined on page 1). Your successor will then have the ability to recommend distributions to the CNCF board of directors.

Successor Advisor 1 Full Name and relationship to you

Successor Advisor 1 Full Address and Contact Information

Successor Advisor 2 Full Name and relationship to you

Successor Advisor 2 Full Address and Contact Information

For additional names, please check here and list on the back of this sheet.

6. DONOR ADVISED GIFT FUND INFORMATION

Before setting up a Giving Fund, please be sure to read through CNCF's Donor Advised Funds Policies and Guidelines which apply to all contributions to your Giving Fund. Ask for your copy or download it from our homepage at www.cncf.ca.

7. MAKING DISTRIBUTIONS FROM YOUR GIVING FUND

According to the Income Tax Act, 80% of your Giving Fund must be distributed to eligible charities and ministries by the end of the next calendar. In order to meet this requirement, CNCF will receive from the Giving Fund Advisor(s) distribution advice on the CNCF "Distribution Recommendation Form". Personalized copies will be provided to the Giving Fund Advisor(s) after the Giving Fund has been established.

Distributions may be made anonymously by indicating such on the form. Distributions may also be designated for particular use as determined and indicated by the Giving Fund Advisor(s).

8. SIGNATURES

I/We acknowledge that I/we have read the CNCF's Donor Advised Funds Policies and Guidelines and agree to the terms and/or conditions described therein. I/we understand that in order to qualify for a donation receipt for tax purposes, CNCF will fully own all contributed assets. I/we further understand that my/our communication regarding the Giving Fund is advisory only and that ultimate decisions and control are that of CNCF.

In witness whereof, the parties have executed this agreement on the date indicated below.

Donor 1 Signature

Date

Donor 2 Signature

Date

Canadian National Christian Foundation officer's signature

The SEAL of the CANADIAN NATIONAL CHRISTIAN FOUNDATION is impressed below: