

RCF Giving Fund Name	
RCF Giving Fund Number  You may find your RCF Giving Number on the home page when you log in to your RCF Giving Fund.	
Please tell us the name, SSN, and contact information for the Grant Advisor completing this form.  Title First Name Middle Ini	ial
Last Name suffix	
Social Security Number Daytime Telephone Number Email Address	
What would you like to update? Check all that apply.  Actions with an asterisk (*) may also be updated online by logging in to your RCF Giving Fund at refgivingfund.donorfirstx.com	
☐ Change RCF Giving Fund Name see Sec	ion 1
☐ Name Change see Sec	ion 2
Update Contact Information and Communication* Preference see Sec	ion 3
Add or Update Successor Grant Advisor(s) or Charitable Beneficiary(ies)*see Sec	ion 4
☐ Change Access to your Financial Advisor see Sec	ion 5
Recommend Investment Reallocation* see Sec	ion 6
1. CHANGE GIVING FUND NAME	
*To update the name of your Giving Fund, enter the new name below.	
New Giving Fund Name	

Questions or need assistance? Call 800-918-3650.



#### 2. NAME CHANGE FOR CURRENT PERSON

Please tell us the current name we have on record, and the new name you would like us to use. Please include a copy of the official name change document.

\*Name as it currently appears in RCF Giving Fund records:

Title	First Name	Middle Initial
Last Name		suffix
*New Name Title	First Name	Middle Initial
Last Name		outfiv
Last Name		suffix

In order for RCF Giving Fund to accept a name change, we must receive a copy of the official name change document. Please mail that to us along with this completed form.



# 3. UPDATE CONTACT INFORMATION AND COMMUNICATION PREFERENCE

Contact Update 1: For whom are you updating information?					
Name (First, Middle, Last)					
Indicate what type of informa	ation you are chan	ging and then comp	lete the relevant items below:	:	
Mailing Address	☐ Davtime	Гelephone	Evening Telepho	ine	Email Address
Send statements electron	onically		Mobile Phone		
Mailing Address					7
City					State Zip Code
Country of Address		Country of Residen	ice	Country of Ci	tizenship
Daytime Telephone Number Evening Telephone Number		Mobile Phone	Mobile Phone Number		
Email Address					
Contact Update 2: For w	hom are you u	odating informat	ion?		
Name (First, Middle, Last)					7
Indicate what type of informa	ation you are chan	ging and then comp	lete the relevant items below:	:	
Mailing Address	Daytime	Telephone	Evening Telepho	one	Email Address
Send statements electro	onically		Mobile Phone		
Mailing Address					
City					State Zip Code
Country of Address		Country of Residen	ce	Country of Ci	tizenship
Daytime Telephone Number		Evening Telepho	one Number	Mobile Phone	Number
Email Address					



### 4. ADD OR UPDATE SUCCESSOR GRANT ADVISOR(S) OR CHARITABLE BENEFICIARY(IES)

Your succession plan specifies how your Giving Fund assets will be handled upon your death. Please copy this page to add or update additional successors.

4A. SUCCESSOR GRANT ADVISOR(S)	
Check One: Add Remove Update	
Title Name of Successor Grant Advisor #1	
Social Security Number Date of Birth	Relationship to Original Donor
Mailing Address	
City	State Zip Code
Country of Address Country of Residence	Country of Citizenship
Daytime Telephone Number Evening Telephone Number	Email Address
Check One: Add Remove Update	
Title Name of Successor Grant Advisor #2	
Social Security Number Date of Birth	Relationship to Original Donor
Mailing Address	
City	State Zip Code
Country of Address Country of Residence	Country of Citizenship
Daytime Telephone Number Evening Telephone Number	Email Address

Grant Advisors must be 18 or older to provide grant or investment recommendations. If a Giving Fund succession plan includes successor Grant Advisors, and no successor has reached the age of 18 at the time of the death, incapacitation or resignation of the last surviving Grant Advisor, RCF will proceed as follows:

- If no successor is at least age 15, RCF will make charitable grants from the Giving Fund until the oldest successor Grant Advisor reaches the age of 18.
- If at least one successor is age 15 or older, RCF will maintain the Giving Fund until the oldest successor Grant Advisor reaches the age of 18.

You may name 1) individual successor grant advisors to succeed you with full grant advisors' rights and privileges, 2) recommend charitable organizations as beneficiaries of the RCF Giving Fund balance in equal amounts, or 3) recommend a combination of successors and beneficiaries. If you recommend a combination, 50% of the RCF Giving Fund balance will remain in the Fund for your successors. The remainder will be distributed to the chartiable organizations in equal amounts. Successors do not have access to your RCF Giving Fund until the death, incapacitation or resignation of all current Grant Advisors associated with your Giving Fund.



4. ADD OR UPDATE SUCCESSOR GRANT AD		BENEFICIARY(IES) (CONT	TINUED)	
4B. RECOMMEND UPDATES TO CHARITABL  Check One: Add Remove	E BENEFICIARY(IES)  Update			
Name of Charitable Beneficiary #1				
Mailing Address				
City	State Zip Code	Daytime Telephone Numb	per	
Employer Identification Number Emai				
Check One: Add Remove	Update			
Name of Charitable Beneficiary #2				
Mailing Address				
City	State Zip Code	Daytime Telephone Numb	er	
Employer Identification Number Emai	l Address (if available)			
You may name charitable organizations as benefic successors and beneficiaries, 50% of the RCF Givin to the approved charitable organizations in equal c	ng Fund balance will remain in th			
5. ADD OR UPDATE YOUR FINANCIAL ADVIS	OR INFORMATION			
By providing RCF with the name of your current Fin to the RCF Giving Fund.	ancial Advisor, you are authorizi	ng RCF to share with such Fir	nancial Advisor, any information	n relating
Add Financial Advisor Re	emove Financial Advisor			
First Name	Last Name		City	State
Add Financial Advisor Re	emove Financial Advisor			
First Name	Last Name		City	State

You may use this section to grant a Financial Advisor access to your RCF Giving Fund, or remove an Advisor who currently has access to your RCF Giving Fund.



#### **6. RECOMMEND INVESTMENT REALLOCATION**

You may recommend one or more options from the list below.

Note: For grant advisors seeking a single option, the Broad Market choice provides a mix of stocks, bonds and short-term instruments.

Broad I	Market	-
N	uveen Lifestyle Income Fund (Target: 20% Equity)	0%
N	uveen Core Equity Fund (Target: 40% Equity)	]%
□ N	uveen Lifestyle Moderate Fund (Target: 60% Equity)	]%
□ N	uveen Lifestyle Growth Fund (Target: 80% Equity)	]%
□ N	uveen Lifestyle Aggressive Growth Fund (Target: 100% Equity)	]%
Flex		
N	luveen Money Market Fund	]%
N	luveen Short Term Bond Fund	9%
_ N	luveen Core Bond Fund	%
_ N	luveen Bond Index Fund	%
	luveen Core Impact Bond Fund	%
	luveen Large Cap Responsible Equity Fund	%
	luveen Social Choice Low Carbon Equity Fund	%
	luveen Equity Index Fund	%
	luveen Core Equity Fund	%
	luveen International Equity Index Fund	%
	luveen International Equity Fund	%

Investment reallocation recommendations are subject to approval.

**Broad Market** options provide diversified investment exposure through a single lifestyle fund with holdings divided between equities and fixed income instruments.

100 %

Total

(Allocations must total 100%)

Flex options offer the opportunity to select from a mix of equity, fixed-income and money market funds.



#### 7. SIGNATURE TO AUTHORIZE UPDATES

I acknowledge that I have read the RCF Giving Fund Program Guidelines: Program Circular and agree to the terms set forth there in. All recommendations are subject to the full and exclusive legal authority, control and discretion of Renaissance Charitable Foundation Inc.

I hereby certify that, to the best of my knowledge, all information presented in connection with this form is accurate, and I will promptly notify RCF Giving Fund in writing of any changes.

Signature	Today's Date (mm/dd/yyyy)

Fax: 877-222-1829

## MAIL, FAX, OR EMAIL THIS FORM TO:

RCF Giving Fund 8888 Keystone Crossing, Suite 1222 Indianapolis, IN 46240

Email us at rcfgivingfund@reninc.com

Questions or Need Assistance? Please call RCF Giving Fund at 800-918-3650.