

Please complete all information in this donor-advised fund application form ("Application"). Print in ink or type. The minimum initial contribution is \$5,000 and each additional contribution must be at least \$1,000.

Return completed forms to:

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

Phone: **(800) 918-3650**
Foundation Fax: **(877) 222-1829**
Email: **rcfgivingfund@reninc.com**

1. DONOR-ADVISED FUND INFORMATION

A Donor-Advised Fund can be named after a Donor, a member of the Donor's family, the Donor's family, or it can reflect an area of interest to the Donor or such family member (e.g. John Donor Family Fund, or the Donor Fund for the Arts). Unless a Donor or Grant Advisor recommends that a grant be made anonymously, the name of the Donor-Advised Fund will be used in correspondence to the charitable organization that receives the grant from the Fund.

Donor-Advised Fund Name

Recommended Primary Charitable Area or Areas of Interest (e.g., cancer research, education, historic preservation)

2. DONOR INFORMATION

Name the Donor(s) who will contribute to and advise on the Fund. Please note that the Primary and Additional Donor will automatically be established as Grant Advisors. To name additional Grant Advisors, complete Section 4.

PRIMARY DONOR*

Mr. Mrs. Ms. Other _____

Full Name

Social Security Number

Date of Birth

Street Address

City

State

Zip

Home Phone

Business Phone

Mobile Phone

Email Address

ADDITIONAL DONOR*

Mr. Mrs. Ms. Other _____

Full Name

Social Security Number

Date of Birth

Street Address

City

State

Zip

Home Phone

Business Phone

Mobile Phone

Email Address

** Reports will be mailed to the Primary Donor only.*

3. CONTRIBUTIONS

A Donor to a Donor-Advised Fund may transfer cash (via wire or check), publicly traded securities, or other property to Renaissance Charitable Foundation Inc. (“RCF”) per the instructions below. **You or your financial advisor must initiate all transfers to Renaissance Charitable Foundation Inc.**

CASH GIFTS

\$ _____

WIRE TRANSFER INSTRUCTIONS:

Bank: The National Bank of Indianapolis
 Address: 107 N Pennsylvania St. Indianapolis, IN 46204
 ABA#: 074006674
 Account #: 1736750
 FBO/FFC: Renaissance Charitable Foundation Receipts
 Memo Detail: Fund account number, Fund name and/or Donor name

CHECK GIFTS

\$ _____

MAIL INSTRUCTIONS:

- **Make check payable to:**
RCF Giving Fund
- **Include in the memo section of the check:**
Donor name or Fund name
- **Mail check to:**
RCF Giving Fund
8888 Keystone Crossing, Suite 1222
Indianapolis, IN 46240

GIFTS OF PUBLICLY-TRADED SECURITIES

There are two main ways to make a stock gift to RCF: by electronic transfer or by mailing your certificates. Electronic transfer works much faster.

The date of a Donor’s gift is the date on which the Donor gives up control. In most cases, this is the date the Donor transfers the shares electronically into RCF’s account or the postmark date on which the Donor mails the Donor’s certificates, stock powers, stock waivers, and/or Letters of Authorization to RCF. In some cases, the date of the gift is delayed until the company’s transfer agent changes its official records to reflect ownership of the shares by RCF. In most cases, the tax-deductible value of a Donor’s gift is the average of the highest and lowest trading prices on the date of the Donor’s gift multiplied by the number of shares given.

ELECTRONIC TRANSFER OF PUBLICLY-TRADED SECURITIES

Donor must complete the information below relating to the securities subject to the gift. Please note that Renaissance Charitable Foundation, Inc. does NOT initiate the asset transfer. A Donor must complete the letter of authorization transfer form of the custodian that holds the securities that the Donor intends to transfer, and submit the same to such custodian or the Donor’s financial advisor, in order for the transfer to be initiated. **You or your financial advisor must initiate all transfers to Renaissance Charitable Foundation Inc.**

DTC/ACAT
 Broker-Dealer Name: Wells Fargo
 DTC Participant #: 0141
 ACCOUNT NAME: Renaissance Charitable Foundation Inc.
 Account #: 15006287

For Physical Stock Certificates, Euroclear, GNMA/Government Securities, Foreign Equities, and DRS/DWAC Deliveries, please contact Renaissance Charitable Foundation Inc. at (800) 918-3650 to coordinate delivery.

Name of Custodian (that holds and will deliver the securities)		Owner(s) of Security	
Name of Security Issuer	CUSIP or Symbol	Number of Shares	Approximate Dollar Value

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PLEASE NOTE: The Donor or the Donor's financial advisor needs to initiate an in-kind transfer of the above securities using the instructions on page 2.

MAILING OF SECURITIES HELD IN CERTIFICATE FORM

Please contact Renaissance Charitable Foundation at (800) 918-3650 for forms needed to gift physical share certificates. DO NOT sign the back of your certificate(s). Doing so will delay the date of a donor's gift until the certificates are transferred into the name Renaissance Charitable Foundation Inc.

4. GRANT ADVISORS

A Donor can appoint one or more individuals as Grant Advisors of the Fund. These Grant Advisors will have authority to recommend grants to be made by the Fund. Grant Advisors appointed by Donor will not succeed the Donor unless they are named as Fund Successors (see Section 5 below). Do not list in this Section 4 any Donor(s) named in Section 2, as such Donors are automatically established as Grant Advisors.

GRANT ADVISOR 1:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street Address of Residence (no P.O. Box address)		City	State	Zip
Mailing Address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

GRANT ADVISOR 2:

First name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street Address of Residence (no P.O. Box address)		City	State	Zip
Mailing Address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

5. FUND SUCCESSORS AND CHARITABLE BENEFICIARIES

Donors have the option to recommend what should occur with the Fund upon their death. There are three options:

- (1) The Donors name one or more successors to the Fund to succeed the Donors after their death (Fund Successors).
- (2) The Donors recommend specific Charitable Beneficiaries to receive either
 - (A) all of the remaining assets with respect to the Fund, OR
 - (B) annual grants from the remaining assets in the Fund (the recommended annual grants may be a percentage of the annual value of the Fund or a set dollar amount per charity, but, if the aggregate value of the annual grants is less than 4% of the annual value of the Fund, RCF may increase the grants pro rata so that the aggregate value of the annual grants is 4% of the annual value of the Fund).
- (3) The Donors make a recommendation in a letter of instruction delivered to RCF. Letters of instructions typically are used in connection with large contributions and include a level of specificity beyond the scope of this form.

Please fill-in either the Fund Successor(s) section immediately below OR the Charitable Beneficiary(ies) section immediately thereafter (or attach a letter of instruction).

FUND SUCCESSOR(S)

Upon the death or incapacity of all of the original Donors of the Fund, please select one of the following options:

- Successors will succeed the prior grant advisor and share equal rights to make recommendations.
- The Fund will split and be divided equally into separate Funds. Your financial advisor will contact the successors to name each newly created Fund, and, if necessary, to reallocate investments and to name advisor(s) and successor(s) to the newly created Fund.

SUCCESSOR 1:

First Name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street Address of Residence (no P.O. Box address)		City	State	Zip
Mailing Address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

SUCCESSOR 2:

First Name	M.I.	Last Name	Date of Birth (mm/dd/yyyy)	SSN/TIN
Street Address of Residence (no P.O. Box address)		City	State	Zip
Mailing Address (if different from above)		City	State	Zip
Home Phone	Business Phone		Mobile Phone	
Email Address				

- OR -

CHARITABLE BENEFICIARY(IES)

Donors may elect that upon the death of all original donors, the remaining assets in the Fund are granted to charitable organizations either immediately or in an annual amount of at least 4% of the annual value. If one of these is the intended option, please complete this section in its entirety. In the event the recommended charity no longer exists or does not qualify to receive grants from a donor-advised fund, RCF will award grants to a charity similar to the original charity.

Recommendation:

(please check the applicable box)

- Grant Of The Balance Of The Fund Assets
- Annual Grant Of The Annual Value Of The Fund (Not Less Than 4%)

CHARITABLE ORGANIZATION 1:

Official Name		
Mailing Address (grants are mailed directly to the charitable organization)		
City	State	Zip
Tax ID Number (if known)	Email Address (if known)	Organization's Website (if known)
Contact Person at Organization	Contact Phone	

If an Annual Grant is Recommended, the annual grant to Charitable Organization 1 shall be either _____% of the Annual Value, or \$_____.

CHARITABLE ORGANIZATION 2:

Official Name _____

Mailing Address (grants are mailed directly to the charitable organization) _____

City _____

State _____

Zip _____

Tax ID Number (if known) _____

Email Address (if known) _____

Organization's Website (if known) _____

Contact Person at Organization _____

Contact Phone _____

If an Annual Grant is Recommended, the annual grant to Charitable Organization 1 shall be either _____% of the Annual Value, or \$_____.
6. FINANCIAL PROFESSIONAL INFORMATION (TO BE COMPLETED BY THE FINANCIAL PROFESSIONAL, IF ANY):

To prevent delays, please complete this section in its entirety.

Financial Professional _____

Name of Firm _____

Email Address _____

Phone Number _____

Main Office Address _____

City _____

State _____

Zip _____

Branch Address _____

City _____

State _____

Zip _____

Signature _____

Date _____

7. RECOMMEND AN INVESTMENT STRATEGY:

The DAF Program offers multiple investment strategies for DAFs. After the Donor recommends a particular investment strategy for the DAF, 100 percent of the initial and future contributions to the DAF are subject to such investment strategy (until the Grant Advisor with respect to such DAF recommends an approved change of investment strategy with respect to such DAF, which change, if any, shall not occur more than once per calendar quarter).

Broad Market

<input type="checkbox"/> Lifestyle Income (Target: 20% Equity)	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> Lifestyle Conservative (Target: 40% Equity)	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> Lifestyle Moderate (Target: 60% Equity)	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> Lifestyle Growth (Target: 80% Equity)	<input type="text"/> <input type="text"/> <input type="text"/> %
<input type="checkbox"/> Lifestyle Aggressive (Target: 100% Equity)	<input type="text"/> <input type="text"/> <input type="text"/> %

TIAA-CREF Core Bond	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF Bond Index	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF SOCIAL CHOICE BOND	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF SOCIAL CHOICE EQUITY	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF Equity Index	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF Social Choice Low Carbon Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF Growth & Income	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF International Equity Index TIAA-	<input type="text"/> <input type="text"/> <input type="text"/> %
CREF International Equity	<input type="text"/> <input type="text"/> <input type="text"/> %
iShares Bitcoin Trust ETF	<input type="text"/> <input type="text"/> <input type="text"/> %

Flex

TIAA-CREF Money Market	<input type="text"/> <input type="text"/> <input type="text"/> %
TIAA-CREF Short-Term Bond	<input type="text"/> <input type="text"/> <input type="text"/> %

Contributions to a Fund are not held in a segregated investment account. Instead, all contributions to all Funds within the RCF Giving Fund for which the same investment strategy has been selected are aggregated into one investment. RCF maintains individualized records with respect to each Fund, allowing each Donor or Grant Advisor of a specific Fund to view at any given time the investment balance, contribution history and grant history with respect to such Fund.

8. ACKNOWLEDGMENTS

The RCF Giving Fund RCF Giving Fund Program is a program sponsored and operated by Renaissance Charitable Foundation Inc., a 501(c)(3) national public charity under the Internal Revenue Code of 1986.

BY SIGNING THIS APPLICATION:

The undersigned person or persons (hereafter referred to in the singular as Donor) authorizes the RCF Giving Fund RCF Giving Fund Program to establish a Donor-Advised Fund. The Donor hereby acknowledges that Donor has received and read the DAF Program Circular and agrees to be legally bound by (1) the terms and conditions of the RCF Giving Fund Circular, as currently in effect and as amended from time to time, (2) the terms and conditions of the Application, or (3) any selection or recommendation made by Donor from time to time, whether in the Application, any other document or form related to the Donor-Advised Fund or otherwise communicated by the Donor, directly or indirectly, to RCF.

The Donor is aware that any recommendation suggested by the Donor in Donor's capacity as Grant Advisor, including concerning the selection of the investment strategy or the investment adviser or the amount or recipient of any grant award to any charitable organization, is advisory in nature. While any such recommendation of Donor will be considered by RCF, RCF has the sole and exclusive authority and discretion to reject any recommendation and make its own determinations, including as to the investment and disbursement of any contributions to any Donor-Advised Fund. The Donor understands that no grant may be made to a private non-operating foundation to satisfy a pre-existing pledge, for any private benefit (dues, membership, etc.) or to support any political campaign activity. The Donor understands that any contribution that Donor makes to RCF through the DAF Program is irrevocable and not refundable to Donor for any reason.

The Donor realizes that any dividend interest and capital gain generated from any Donor-Advised Fund belong to RCF; therefore, the Donor cannot and will not claim that income as additional tax deductions. Once any contribution is accepted, it is the property of RCF, governed by an independent Board of Directors. The Donor understands that RCF will charge the Fund (and deduct from any Fund balance) all applicable administration fees and investment advisory fees, in each case, consistent with its standard procedures. The Donor certifies that, to the best of the Donor's knowledge, all information presented in connection with this Application is accurate and agrees to notify RCF promptly of any changes.

Signature

Date

Printed Name of Donor

Signature

Date

Printed Name of Donor

If married, both donors should sign.

Return completed form to:

RCF Giving Fund Donor-Advised Fund Program

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Suite 1222
Indianapolis, IN 46240

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Foundation Fax: (877) 222-1829

Email: rcfgivingfund@reninc.com

or visit our website at: rcfgivingfund.donorfirstx.com