

Please print in uppercase using black or dark blue ink. This form may be completed by any Grant Advisor. Sign, and then fax, email, or mail

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 Initial

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 rcfgivingfund.donorfirstx.com

- Change RCF Giving Fund Name see Section 1
- Name Change see Section 2
- Update Contact Information and Communication* Preference see Section 3
- Add or Update Successor Grant Advisor(s) or Charitable Beneficiary(ies)* see Section 4
- Change Access to your Financial Advisor see Section 5
- Recommend Investment Reallocation* see Section 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
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	suffix	
<input type="text"/>	<input type="text"/>	

***New Name**

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	suffix	
<input type="text"/>	<input type="text"/>	

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 information you are changing and then complete the relevant items below:

- Mailing Address
 Daytime Telephone
 Evening Telephone
 Email Address
 Send statements electronically
 Mobile Phone

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone Number

Mobile Phone Number

Email Address

Contact Update 2: For whom are you updating information?

Name (First, Middle, Last)

Indicate what type of information you are changing and then complete the relevant items below:

- Mailing Address
 Daytime Telephone
 Evening Telephone
 Email Address
 Send statements electronically
 Mobile Phone

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone 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		
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>		
Social Security Number	Date of Birth	Relationship to Original Donor	
<input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/>	<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> / <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> / <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/>	<input style="width: 100%;" type="text"/>	
Mailing Address			
<input style="width: 100%;" type="text"/>			
City	State	Zip Code	
<input style="width: 70%;" type="text"/>	<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/>	<input style="width: 20%;" type="text"/>	
Country of Address	Country of Residence	Country of Citizenship	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
Daytime Telephone Number	Evening Telephone Number	Email Address	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	

Check One: Add Remove Update

Title	Name of Successor Grant Advisor #2		
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>		
Social Security Number	Date of Birth	Relationship to Original Donor	
<input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/>	<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> / <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> / <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/>	<input style="width: 100%;" type="text"/>	
Mailing Address			
<input style="width: 100%;" type="text"/>			
City	State	Zip Code	
<input style="width: 70%;" type="text"/>	<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/>	<input style="width: 20%;" type="text"/>	
Country of Address	Country of Residence	Country of Citizenship	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
Daytime Telephone Number	Evening Telephone Number	Email Address	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	

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 charitable 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 ADVISOR(S)[†] OR CHARITABLE BENEFICIARY(IES) (CONTINUED)
4B. RECOMMEND UPDATES TO CHARITABLE BENEFICIARY(IES)
Check One: Add Remove Update

Name of Charitable Beneficiary #1

Mailing Address

City

State

Zip Code

Daytime Telephone Number

Employer Identification Number

 -

Email Address (if available)

Check One: Add Remove Update

Name of Charitable Beneficiary #2

Mailing Address

City

State

Zip Code

Daytime Telephone Number

Employer Identification Number

 -

Email Address (if available)

You may name charitable organizations as beneficiaries of the RCF Giving Fund balance in equal amounts. If you recommend a combination of successors and beneficiaries, 50% of the RCF Giving Fund balance will remain in the Fund for your successors. The remainder will be distributed to the approved charitable organizations in equal amounts.

5. ADD OR UPDATE YOUR FINANCIAL ADVISOR INFORMATION

By providing RCF with the name of your current Financial Advisor, you are authorizing RCF to share with such Financial Advisor, any information relating to the RCF Giving Fund.

 Add Financial Advisor Remove Financial Advisor

First Name

Last Name

City

State

 Add Financial Advisor Remove 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 Market

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

Flex

- | | |
|--|--|
| <input type="checkbox"/> Nuveen Money Market Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Short Term Bond Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Core Bond Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Bond Index Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Core Impact Bond Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Large Cap Responsible Equity Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Social Choice Low Carbon Equity Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Equity Index Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen Core Equity Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen International Equity Index Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> Nuveen International Equity Fund | <input type="text"/> <input type="text"/> <input type="text"/> % |
| <input type="checkbox"/> iShares Bitcoin Trust ETF | <input type="text"/> <input type="text"/> <input type="text"/> % |

Total 100 % (Allocations must total 100%)

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.

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)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	2	0	<input type="text"/>	<input type="text"/>
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MAIL, FAX, OR EMAIL THIS FORM TO:

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

Fax: 877-222-1829

Email us at rcfgivingfund@reninc.com

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