

Designated Fund Form

If you are interested in opening a Designated Fund with the Community Foundation of Greater Des Moines, please complete this form. As you answer questions, more selection options will branch out depending on your selected answers. There are definitions located throughout the form to assist you in answering the questions. Once you have submitted the form, a member from our Charitable Giving Team will be in contact with you to further discuss your charitable giving fund.

PLEASE NOTE: Once you begin the application, you will not be able to save and return. After you have completed all the questions, you are able to scroll through to review your responses prior to submitting the form. Please make sure you have all required answers completed prior to submitting the form. You will be able to download a copy of your answers after submitting the form if desired.

* Required

1. What would you like to name the fund? *

Enter your answer

2. Would like to setup an endowed , endow Iowa or non-endowed fund? *

Endowed: Distributions can be made up to the Community Foundation spending rate

Endow Iowa: Distributions can be made to an Iowa based non-profit up to a 5% spending rate

Non-Endowed: All Fund Property is available for distribution


Endowed

Endow Iowa

Non-Endowed

3. Founding Donor 1 Name *

Enter your answer

4. Founding Donor 1 Preferred Address 

Home

Business

5. Founding Donor 1 Home Address

Street, City, State, Zip Code

Enter your answer

6. Founding Donor 1 Preferred Phone 

Home

Mobile

Business

7. Founding Donor 1 Home Phone

Enter your answer

8. Founding Donor 1 Date of Birth

Enter your answer

9. Founding Donor 1 Business or Organization Name

Enter your answer

10. Founding Donor 1 Organization Position

Enter your answer

11. Founding Donor 1 Organization Phone Number

Enter your answer

12. Founding Donor 1 Preferred Email Address 

Personal

Business

13. Founding Donor 1 Personal Email Address

Enter your answer

14. Is there a Second Founding Donor? *

Yes

No

15. Founding Donor 2 Name *

Enter your answer

16. Founding Donor 2 Preferred Address 

Home

Business

17. Founding Donor 2 Home Address

Street, City, State, Zip Code

Enter your answer

18. Founding Donor 2 Preferred Phone Number 

Home

Mobile

Business

19. Founding Donor 2 Home Phone

Enter your answer

20. Founding Donor 2 Date of Birth

Enter your answer

21. Founding Donor 2 Business or Organization Name

Enter your answer

22. Founding Donor 2 Business Position

Enter your answer

23. Founding Donor 2 Organization Phone Number

Enter your answer

24. Founding Donor 2 Preferred Email Address 

Personal

Business

25. Founding Donor 2 Personal Email Address

Enter your answer

26. Beneficiary Organization Name

Enter the Organization Legal Name

Enter your answer

27. Beneficiary Contact Person

Enter your answer

28. Beneficiary Email Address

Enter your answer

29. Beneficiary Mailing Address

Street, City, State, Zip Code

Enter your answer

30. Beneficiary Phone Number

Enter your answer

31. Motivation *

What motivated you to establish this fund? (Please check all that apply)

Involve multiple generations in giving

- Simplify my annual charitable giving
- Memorialize/Honor someone
- Benefit the community
- Learn about a specific issue
- Reduce tax burden
- Other

32. Is this a Public or Private fund *

Note: Founding donor and/or CIP does not receive MMF access on Public Funds.

- Private
- Public

33. Private Fund-would you like your name included in the fund name? *

- Yes
- No

34. Private Fund-Provide MMF Access to Donor(s) *

- Founding Donor 1
- Founding Donor 2

35. Private Fund-Beneficiary Choices *

Provide Beneficiary with:

- A copy of the fund agreement
- Read only MMF(CF online fund portal) access
- Incoming gifts email notification

36. Private Fund-Electronic fund statements to Founding Donor(s) *

Please check all that apply

- Founding Donor 1
- Founding Donor 2

37. Distribution *

- Automatic Distribution
- As Requested Distribution

38. Preferred Date of Distribution *

Enter your answer

39. Please enter the desired annual distribution % *

The Community Foundation's recommended distribution rate for endowed funds is 5%.

Enter your answer

40. Initial Gift Contribution *

Please enter the dollar amount and gift type or describe the anticipated gift.

i.e. \$35,000 check or \$25,000 in stocks

Enter your answer

41. Which Investment Portfolios would you like to invest in? *

Community Foundation of Greater Des Moines - Mercer Portfolios - These portfolios have been developed and constructed by the Investment Committee and Mercer Investment Consulting. All managers have been vetted and approved through Mercer's rigorous approval process. Mercer and the Investment Committee provide ongoing monitoring of these portfolios and managers.

Charitable Investment Partner - Through the Community Foundation's Charitable Investment Partner(CIP) Program, donors are allowed to continue working with their trusted investment advisor. If you would like to invest with your current advisor instead of participating in one of the portfolio options offered through the Community Foundation, please enter your advisor's information here.

Mercer Investments

Charitable Investment Partner

42. Investment Portfolios *

Long-Term Growth Portfolio - Diversified portfolio of global stocks and bonds with a growth emphasis.

Indexed Growth Portfolio - Diversified portfolio of global stocks and bonds with a growth emphasis through indexed funds.

Moderate Growth Portfolio - Moderate portfolio of global bonds and stocks with a risk reduction emphasis.

Money Market Portfolio - Portfolio of cash/cash equivalents to maintain liquidity and preserve principal.

Long-Term Growth Portfolio

Indexed Growth Portfolio

Moderate Growth Portfolio

Money Market Portfolio

43. % Long-Term Growth Portfolio

Please make sure your overall selections total 100%

Enter your answer

44. % Indexed Growth Portfolio

Please make sure your overall selections total 100%

Enter your answer

45. % Moderate Growth Portfolio

Please make sure your overall selections total 100%

Enter your answer

46. % Money Market Portfolio

Please make sure your overall selections total 100%

Enter your answer

47. Referral Source *

I already have a Community Foundation fund

- Community Foundation Board Member
- Community Foundation Staff
- A friend that has a Community Foundation fund
- Positive community reputation/media
- Professional Advisor-Attorney
- Professional Advisor-Financial Advisor
- Professional Advisor-Trust Officer
- Professional Advisor-CPA

48. Anonymity *

You may choose to have aspects of your fund remain anonymous. (Please check all that apply.)

- I do not wish to be anonymous.
- Do not list my fund name in publications or on the Community Foundation website.
- Do not list my fund name on any grant distributions from my fund.

49. Are any of these Anonymity restrictions removed upon your death? *

- Yes
- No

50. Is this an Affiliate or Direct Fund? *

Direct is with the Community Foundation of Greater Des Moines. Affiliate is with one of our 46 County and Community Foundation in Iowa.

Affiliate Direct

51. Additional Information

Story County

You can print a copy of your answer after you submit

Never give out your password. [Report abuse](#)



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