

# Donor Advised Fund Form

If you are interested in opening a Donor Advised 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 submission 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 (5%).

**Endow Iowa:** Distributions can be made to an Iowa based nonprofit up to a 5% spending rate.

**Non-Endowed:** All Fund Property is available for distribution.

Endowed

Endow Iowa

Non-Endowed

### 3. Is the Donor also a Fund Advisor \*

- **Donor:** An individual making the establishing gift for the fund.
- **Advisor:** The individual who makes decisions on behalf of the fund including distributions, investment and succession.

Yes

No

### 4. Fund Advisor 1 Full Name \*

An individual who makes decisions on behalf of the fund including distributions, investment and succession.

Enter your answer

### 5. Fund Advisor 1 - Preferred Address \*

Home

Business

### 6. Fund Advisor 1 - Business Address

Street, City, State, Zip Code

Enter your answer

### 7. Any Other Type of Address you would like us to have on file? \*

No

Winter/Seasonal

Other

8. Fund Advisor 1 - Other Address

Street, City, State, Zip Code

Enter your answer

9. Fund Advisor 1 - Preferred Phone Number \*

Home

Mobile

10. Fund Advisor 1 - Home Phone Number \*

Enter your answer

11. Fund Advisor 1 - Date of Birth

Please input date (M/d/yyyy)



12. Fund Advisor 1 - Business or Organization Name

Enter your answer

13. Fund Advisor 1 - Position/Job Title

Enter your answer

14. Fund Advisor 1 - Business or Organization Address

Street, City, State, Zip Code

Enter your answer

15. Fund Advisor 1 - Business Phone Number

Enter your answer

16. Fund Advisor 1 - Manage My Fund (Community Foundation's online fund portal) access \*

**Full Access:** Ability to recommend grants and make fund amendments

**Read-Only Access:** Ability to view all activity for the fund

**No Access:** No access to the fund

Full Access

Read Only Access

No Access

17. Fund Advisor 1 - Fund Statement Provided by \*

**Email Statement:** Email will be sent when fund statements are available in your online account.

**Hard Copy Statement:** Paper fund statement will be mailed to your preferred address.

**No Statement:** No notice will be sent, but if given online access, will still have the ability to view statements in the portal.

Email Statement

Hard Copy Statement

No Statement

18. Is there a Second Fund Advisor? \*

Yes

No

19. Fund Advisor 2 - Full Name \*

Another individual in charge of making decisions on behalf of the fund including distributions, investment and succession

Enter your answer

20. Do we have Fund Advisor 2 profile info in iPhi already? \*

Yes

No

21. Fund Advisor 2 - Preferred Address \*

Home

Business

22. Fund Advisor 2 - Home Address \*

Street, City, State, Zip Code

Enter your answer

23. Fund Advisor 2 - Preferred Phone Number \*

Home

Mobile

24. Fund Advisor 2 - Mobile Phone Number \*

Enter your answer

25. Fund Advisor 2 - Date of Birth

Please input date (M/d/yyyy)



26. Fund Advisor 2 - Business or Organization Name

Enter your answer

27. Fund Advisor 2 - Position/Job Title

Enter your answer

28. Fund Advisor 2 - Business or Organization Address

Street, City, State, Zip Code

Enter your answer

29. Fund Advisor 2 - Business Phone Number

Enter your answer

30. Fund Advisor 2 - Relationship Type

Enter your answer

31. Fund Advisor 2 - Manage My Fund (Community Foundation's online fund portal) access \*

**Full Access:** Ability to recommend grants and make fund amendments

**Read-Only Access:** Ability to view all activity for the fund

**No Access:** No access to the fund

Full Access

Read Only Access

No Access

32. Fund Advisor 2 - Fund Statement Provided by \*

**Email Statement:** Email will be sent when fund statements are available in your online account.

**Hard Copy Statement:** Paper fund statement will be mailed to your preferred address.

**No Statement:** No notice will be sent, but if given online access, will still have the ability to view statements in the portal.

Email Statement

Hard Copy Statement

No Statement

33. Is there third Fund Advisor? \*

Yes

No

34. Fund Advisor 3 - Full Name \*

Enter your answer

35. Do we have Fund Advisor 3 profile info in iPhi already? \*

Yes

No

36. Fund Advisor 3 - Relationship Type

Enter your answer



37. Fund Advisor 3 - Manage My Fund (Community Foundation's online fund portal) access

**Full Access:** Ability to recommend grants and make fund amendments

**Read-Only Access:** Ability to view all activity for the fund

**No Access:** No access to the fund

Full Access

Read Only Access

No Access

38. Fund Advisor 3 - Fund Statement Provided by

**Email Statement:** Email will be sent when fund statements are available in your online account.

**Hard Copy Statement:** Paper fund statement will be mailed to your preferred address.

**No Statement:** No notice will be sent, but if given online access, will still have the ability to view statements in the portal.

Email Statement

Hard Copy Statement

No Statement

39. Send fund correspondence to which Fund Advisors?

Fund Advisor 1

Fund Advisor 2

Fund Advisor 3

All

## 40. Anonymity \*

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

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

## 41. Are any of these Anonymity restrictions removed upon your death? \*

 Yes No

## 42. Fund type upon expiration of the Advisory Period \*

**The Advisory Period shall expire upon the death, resignation or incapacity of the Fund Advisors. Please select fund type and then proceed to following question to designate how remaining fund property will be distributed or managed.**

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

**Non-Endowed:** All Fund Property is available for distribution

 Endowed Non-Endowed

## 43. Please designate how remaining fund property will be distributed or managed:

**When the Advisory period of the fund expires, the fund should be used for the following charitable purposes. Please select all that apply.**

- Better Together Fund: to be used by the Community Foundation for the benefit of its grantmaking programs.
- Fields of Interest: to be distributed to charities and programs engaged in work in these areas as identified by the Community Foundation staff.
- Charitable Organizations: to be distributed to the designated charitable organizations noted below.
- Successor Advisors: Fund shall be advised by the Successor Advisors noted below.

Better Together Fund

Fields of Interest

Charitable Organizations

Successor Advisors

44. Better Together Fund

**Percentage to be used by the Community Foundation for the benefit of its grantmaking programs.**

**Please make sure your selection totals 100% with all selections.**

Enter your answer

45. Fields of Interest

**Percentage to be distributed to charities and programs engaged in work in these areas as identified by the Community Foundation staff.**

**Please make sure your selection totals 100% with all selections.**

Enter your answer

46. Field of Interests-List percentage to each if more than one

**i.e. 50% Arts & Culture, 50% Leadership Development**

Enter your answer

47. Charitable Organizations

**Percentage to be distributed to the designated charitable organizations noted below.**

**Please make sure your selection totals 100% with all selections.**

Enter your answer

48. Charitable Organizations-List percentage to each if more than one

**i.e. 75% ABC Org, 25% XYZ Services**

Enter your answer

49. Successor Advisors \*

**Percentage of fund that shall be advised by the Successor Advisors noted below.**

**Please indicate % in the Other Box if desired.**

None

Other

50. 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

51. How would you like your fund to be invested? \*

**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

## 52. 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

## 53. % Long-Term Growth Portfolio

**Please make sure your overall selections total 100%**

Enter your answer

54. % Indexed Growth Portfolio

**Please make sure your overall selections total 100%**

Enter your answer

55. % Moderate Growth Portfolio

**Please make sure your overall selections total 100%**

Enter your answer

56. % Money Market Portfolio

**Please make sure your overall selections total 100%**

Enter your answer

57. How did you hear about us? \*

- 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

58. Better Together Fund 

Would the fund advisor like more information on the Community Foundation's Better Together Fund, the unrestricted funds that are used to invest in our community's most important issues, opportunities, and needs?

- Yes
- No

59. 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

60. Is there any other information that we should know before preparing your fund agreement?

Enter your answer

You can print a copy of your answer after you submit

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