

CFSV GIVING FUND APPLICATION

Please complete the following application to establish a Giving Fund (donor advised fund) with Christian Foundation of Silicon Valley (CFSV). For complete policies and Fund information, read CFSV's Program Guidelines. If you need assistance, contact CFSV at 866.580.GIVE (4483).

1 GIVING FUND INFORMATION

What would you like to name the Fund? _____

For Example: The Smith Family Giving Fund, The John 3:16 Fund, The Main Street Church Fund, etc. The Fund name and your name will appear on all Fund correspondence, as well as all correspondence that accompanies grants (distributions) from the Fund (unless you request anonymity).

FUND TYPE

Circle One: Individual Family Ministry Church Company

If Fund is for a church, ministry, or company, list its name here (if applicable).

2 GIVING FUND ADVISOR CONTACT INFORMATION

PRIMARY ADVISOR

Title First Name Initial Last Name Suffix

Date of Birth Social Security # / Tax ID #

Address: Including P.O. Box, street address, suite or apartment #

City State Zip

Home Ph. Business/Cell Fax

Email Address*

**This is required and will be your User ID on the Donor Website.
E-Notifications will be sent here when quarterly statements are available.*

Preferred Method of Contact (Circle One)

Email Home Ph. Bus. Ph. Mail Cell

ADDITIONAL PRIMARY ADVISOR

Title First Name Initial Last Name Suffix

Date of Birth Social Security # / Tax ID #

Address: Including P.O. Box, street address, suite or apartment #

City State Zip

Home Ph. Business/Cell Fax

Email Address

Preferred Method of Contact (Circle One)

Email Home Ph. Bus. Ph. Mail Cell

Unless instructed (by separate attachment), CFSV will accept recommendations from either of the individuals named above. To add additional advisors, please provide the above information for each advisor on a separate sheet. If you wish to authorize additional advisors, please note their contact information (including email and address) on a separate sheet.

3 PROFESSIONAL ADVISOR INFORMATION (IF APPLICABLE)

If you work with a professional advisor that you wish to have access to your Fund, please fill out the following section (*attach an additional sheet if you have more than one professional advisor*). If you do not wish for your professional advisor to have access, leave this section blank.

Type of Advisor: (Circle One) Accountant Attorney Financial Planner Investment Manager Other (*Specify*)

Professional Advisor Name & Firm Name _____

Mailing Address _____

City _____

State _____

Zip _____

Phone _____

Email _____

I authorize my advisor to recommend grants from the Fund: Yes No (*if no box is checked, we will assume "No"*)

4 CONTRIBUTION INFORMATION

The suggested initial contribution to establish a Giving Fund is \$10,000. Please refer to CFSV's Program Guidelines for information on the types of gifts CFSV can accept.

Please check the type of contribution you will be making:

Check(s) in the amount of \$ _____
Check(s) should be made payable to "Christian Foundation of Silicon Valley" ***Insert Fund Name in Memo on Check***

Wire in the amount of \$ _____
Please contact CFSV for wiring instructions.

Assets to be gifted at a later time via testamentary gifting
Please contact CFSV for more information or download "Testamentary Gift Information" from our website.

A nonliquid gift (as defined in Program Guidelines)
Please contact CFSV for more information or download "Asset Transfer Instructions" from our website.

Publicly traded securities or mutual fund shares
Name of stock or mutual fund: _____
Number of shares: _____
To initiate transfer, visit the "Forms & Reports" section of our website or contact CFSV for instructions.

5 INVESTMENT INFORMATION

Anticipated Fund Balance (*Select One*): Less than \$100,000 Greater than \$100,000

Your Giving Fund balance may be invested, dependent upon the size of your Fund, providing opportunity for financial growth. Please note that if a Fund's balance is under \$50,000, it will be a "Stable Value Fund" with no monthly administrative costs, gains, or losses posted. If at any time the Fund's balance goes over \$50,000, the balance will automatically be invested according to the pool you select below, and standard administrative costs will apply. If the balance again drops below \$50,000, the Fund will once again be a "Stable Value Fund." **Please select one investment pool. You can select up to two pools if your Fund balance will be \$100,000 or greater.** Percentages must total 100%.

____% **Money Market:** Lower risk, Money Market Fund Rates

____% **Bond:** Income Producing

____% **Conservative:** 40% Equities, 60% Bond Funds

____% **Balanced:** 50% Equities, 50% Long-Term and Short-Term Bonds & Money Market Funds

____% **Growth:** 60% U.S. Equities, 20% International Equities, 20% Intermediate Bonds & Money Market Funds

