

CNCF Donor Advised Legacy Fund Application

Please complete the following application to establish a **CNCF Legacy Fund** (donor advised) with the Canadian National Christian Foundation (CNCF). For complete policies and fund information, read CNCF's Donor Advised Funds Policies and Guidelines at www.cncf.ca. If you need assistance, please call 1-866-336-3315 or simply email info@cncf.ca.

1. LEGACY FUND INFORMATION

DONOR NAME _____

The person whose Estate will be establishing this Fund

Contact Name / Address: _____

FUND NAME

What would you like to name this fund? _____

For example: The Smith Family Legacy Fund, or the Jane Smith Memorial Fund, etc.

FUND TYPE

Circle One: Individual Family Ministry Church Company

2. ADVISOR CONTACT INFORMATION

ADVISOR 1*

Mr./Mrs. First Name Initial Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

ADVISOR 2*

Mr./Mrs. First Name Initial Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

*The Advisor(s) for this Legacy Fund will be the long-term contact for CNCF in the management and decision-making related to the Fund. To add additional Advisors, please provide the same contact information requested above for each on a separate sheet.
If this area is left blank, the CNCF Board of Directors will assume the advisor role for this fund.

3. CONTRIBUTION INFORMATION

The suggested opening balance for a CNCF Legacy Fund is a minimum of \$5,000.

Please check off all types of contributions a donor will be making:

- A cheque in the amount of \$ _____ *Cheques should be made out to "Canadian National Christian Foundation"*
- Publicly traded securities or mutual fund shares
Name of stock or mutual fund: _____
Approximate value: \$ _____
Number of shares: _____ *To initiate the transfer, please use the Securities Transfer Form available as a download from the homepage at www.cncf.ca, or contact us.*
- A non-liquid gift - *Please contact CNCF for more information.*
- The proceeds of a life insurance policy, estimated to be worth \$ _____ with the following insurance company: _____
- Transfer of a CNCF Giving Fund: (name) _____
- Other (A testamentary gift, an RRSP or RRIF, etc.) Describe: _____

Contributions to the Legacy Fund are irrevocable and non-transferable. As required by law, all such funds are the property of CNCF and CNCF retains full and unlimited control of them. CNCF will use its best efforts to efficiently and effectively make distributions to the donees chosen by Legacy Fund advisor(s).

4. FINANCIAL ADVISOR INFORMATION

The donor/advisor may choose to require that their own professional financial advisor manage the Legacy Fund if the charitable goals stated include long-term management of the Fund. If the donor/advisor notifies CNCF that the donor/advisor no longer wishes that professional advisor to so manage, the Legacy Fund shall be added to the Legacy Fund pool of investments and managed by the CNCF broker in the normal course.

Financial Advisor - Full Name and Company Information

Address

Telephone

Email Address

- Add to the CNCF Investment Pools

If this area is left entirely blank, it is assumed that the funds will added to the CNCF Legacy Fund pool of investments and managed by the CNCF broker according to the CNCF Investment Policy (available upon request).

5. CHARITABLE GOALS

The information below will guide CNCF and the Fund advisor(s) in the management and investment of your fund.

How long do you plan to have your Legacy Fund in place?

- In perpetuity - *the original capital will remain intact forever.*
- A specific period of time. How long? _____ years.
- The original capital should be distributed as follows:

_____ % in _____ years

_____ % in _____ years

_____ % in _____ years

_____ % in _____ years

Please give careful consideration to how long you wish to have your Legacy Fund in place. You may wish to provide an annual income to charities of your choice for a certain number of years, and then provide larger gifts by releasing the capital of the fund over a period of years.

Use an additional sheet for more detailed instructions, if required.

Do you have specific annual distributions in mind to be generated from this fund? *Please be specific.*

\$ or %

Charity Name, Charitable registration #

Charity Address

Specific Instructions

\$ or %

Charity Name, Address, Charitable registration #

Charity Address

Specific Instructions

\$ or %

Charity Name, Address, Charitable registration #

Charity Address

Specific Instructions

** Please include another sheet if required for more instructions.

6. DONOR-ADVISED LEGACY FUND INFORMATION

Before setting up an Legacy Fund, please be sure to read through CNCF's Donor Advised Funds Policies and Guidelines which apply to all contributions to your Legacy Fund. Ask for your copy or download it from our homepage at www.cncf.ca.

7. NEXT STEPS

1. Complete the Legacy Fund Application Form.
2. Send the documents to: CNCF, 435 - 300 Earl Grey Drive, Ottawa ON K2T 1C1
3. CNCF will sign the agreement and return a copy to you for your files, indicating the fund is established.
4. CNCF commits to carrying out your written instructions in this form and in any other documents received from you, to ensure that your giving continues in a manner consistent with your desires.

I/We acknowledge that I/we have read the CNCF's Donor Advised Funds Policies and Guidelines and agree to the terms and/or conditions described therein. I/we understand that in order to qualify for a donation receipt for tax purposes, CNCF will fully own all contributed assets. I/we further understand that my/our communication regarding the Legacy Fund is advisory only and that ultimate decisions and control are that of CNCF.

In witness whereof, the parties have executed this agreement on the date indicated below.

DONOR 1 Signature

Date

DONOR 2 Signature

Date

Canadian National Christian Foundation officer's signature

Date

The SEAL of the CANADIAN NATIONAL CHRISTIAN FOUNDATION is impressed below: