

## CNCF Donor Advised Giving Fund Application

Please complete the following application to establish a **CNCF Giving Fund** (donor advised fund - DAF) 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](http://www.cncf.ca). If you need assistance, please call 1-866-580-9319 x102 or simply email [info@cncf.ca](mailto:info@cncf.ca).

### GIVING FUND INFORMATION

#### FUND NAME

What would you like to name this fund? \_\_\_\_\_

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

#### FUND TYPE

Check One:    Individual            Family            Ministry            Church            Company

If this fund is being established by a church, ministry or company, list its name here:

\_\_\_\_\_

### DONOR CONTACT INFORMATION

#### PRIMARY DONOR or DAF ADVISOR 1\*

Mr./Mrs. First Name    Initial            Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

#### DONOR or DAF ADVISOR 2\* (Joint Fund \*? yes no)

Mr./Mrs. First Name    Initial            Last Name

Date of Birth

Street Address

City

Province

Postal Code

Telephone (primary contact number)

Email address

\* Each donor is also an advisor of the Giving Fund unless this is church, ministry or company Fund, or unless this is set up after death. Please provide advisor information for these situations. In the case of a Joint Fund, CNCF will require the signatures of all DAF Advisors for any grant recommendations. If this is not a Joint Fund, CNCF will receive instructions from any individual Advisor. To add additional DAF Advisors, please provide the same contact information requested above for each on a separate sheet.

## CONTRIBUTION INFORMATION

The required opening balance for a CNCF Giving Fund is a **minimum of \$25,000** to be received by CNCF within 30 days of submission of this application. Additional contributions to the Giving Fund must be valued at a minimum market value of \$2,000 each. *Please use the "CNCF Contribution Form" for each additional donation, found at [www.cncf.ca](http://www.cncf.ca).*

**Please check off the type of contribution you will be making:**

- A cheque in the amount of \$ \_\_\_\_\_ *Cheques should be made out to "Canadian National Christian Foundation" with name of fund in Memo line*
- Publically 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 [www.cncf.ca](http://www.cncf.ca), or contact us.*
- Wire or electronic transfer for \$ \_\_\_\_\_
- On-line donation through CNCF's secure payment system at [www.cncf.ca](http://www.cncf.ca) for \$ \_\_\_\_\_
- The proceeds of a life insurance policy, estimated to be worth \$ \_\_\_\_\_ with the following insurance company: \_\_\_\_\_
- A non-liquid gift. *Please contact CNCF for more information.*
- Other (A testamentary gift, an RRSP or RRIF, etc.) Describe: \_\_\_\_\_

Contributions to the Giving 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.

## FINANCIAL ADVISOR INFORMATION

The donor/DAF advisor may choose their own professional financial advisor to manage the Giving Fund if the charitable goals stated include long-term management of the Fund and if the **minimum balance is \$25,000**. If the donor/DAF advisor notifies CNCF that the donor/DAF advisor no longer wishes that professional advisor to so manage, the Giving Fund shall be added to the Giving Fund pool of investments and managed by the CNCF broker in the normal course.

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Financial Advisor - Full Name and Company Information

Email Address

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Address

Telephone

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Assistant Name and Contact Info

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 Giving Fund pool of investments and managed by the CNCF broker according to the CNCF Investment Policy (available upon request).

## CHARITABLE GOALS

The information below will provide non-binding guidance to CNCF and/or your financial advisor in the management and investment of your fund. Please see the DAF Policies and Guidelines document for more details on each option.

- Active Fund** - actively granting and/or receiving new contributions, to be in place for an undetermined length of time
- Medium-Term Fund** - grants are expected to be made over about 3-5 years, with approximately \$\_\_\_\_\_ being granted each year.
- Long-Term with Timelines** - with approximately \$\_\_\_\_\_ or \_\_\_\_\_% being granted each year and the original capital being granted as follows:

\_\_\_\_\_ % in \_\_\_\_\_ years

*Please give careful consideration to how long you wish to have your Giving 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.*

\_\_\_\_\_ % in \_\_\_\_\_ years

\_\_\_\_\_ % in \_\_\_\_\_ years

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

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

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## CNCF OPERATING COST ALLOCATION

When you choose to work with CNCF, you do more than gain a partner in giving - you support a ministry. To fund the variety of solutions and resources we provide, we recover our costs by assessing a small percentage from each Giving Fund.

Up to \$2M - 1%

Over \$2M receive special consideration

*Special Assessment:* a charge may be imposed to cover any unusual amounts of time and/or expense on the part of CNCF in order to effectuate, administer and/or liquidate all or part of the assets gifted and forming part of the DAF.

Please note that the above costs allocations do not include the investment management or advisory fees payable by CNCF to Financial Services Providers chosen by the donor.

## MAKING GRANTS FROM YOUR GIVING FUND

CNCF is prepared to consider grants to 'qualified donees' upon receipt of a properly completed and signed 'CNCF Grant Recommendation Form' from the DAF Advisor(s). Grants may be made anonymously and confidentially by indicating such on the form. Grants may also be designated for particular use as determined and indicated by the Giving Fund Advisor(s). Request a form at [info@cncf.ca](mailto:info@cncf.ca) or at [www.cncf.ca](http://www.cncf.ca) under 'Forms'.

**SUCCESSION INFORMATION** (not required, can be completed at a later date)

In the event of your death or incapacity, or the termination of your organization, you may wish to provide CNCF with a “succession plan” for the Giving Fund you have established, particularly if there is presently only one named DAF Advisor (as outlined on page 1). These details may be provided at a later date if you wish.

There are three ways to divide the assets that would remain in your Giving Fund at your death. You may select any one of these, or a combination of some or all. Combinations must total 100% in the far right column.

**A. Transfer to successor DAF Advisor(s)** who will make future decisions about grant recommendations.

SUCCESSOR ADVISOR 1 - Full Name and relationship to you	Email address	<input type="text"/>
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Full Address	Telephone #	
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SUCCESSOR ADVISOR 2 - Full Name and relationship to you	Email address	<input type="text"/>
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Full Address	Telephone #	
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For additional names, please check here  and list on the back of this sheet.

**B. Grants to ministries and charities** such as your church or favourite organizations you have supported throughout your lifetime. This support may be distributed over a period of time. *Please attach a separate sheet with your specific instructions if this is your desire.*

Ministry Name, Address, Charitable registration #	<input type="text"/>
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Ministry Name, Address, Charitable registration #	<input type="text"/>
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Ministry Name, Address, Charitable registration #	<input type="text"/>
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Ministry Name, Address, Charitable registration #	
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**C. Grant to CNCF** to support the work of the organization as it carries out its mission, to be used and/or granted as the Board of CNCF determines.

**Total (must be 100 %):** \_\_\_\_\_

If no successor DAF Advisors are named, or if those named are unable or unwilling to serve in this capacity, the CNCF board of directors will make grants out of the DAF without the involvement of a DAF Advisor which are consistent with the donor’s past grant recommendations and/or expressed areas of interest.

## DONOR ADVISED GIFT FUND INFORMATION

Before setting up a Giving Fund, donors are required to read through CNCF's Donor-Advised Funds Policies and Guidelines which apply to a Giving Fund. Ask for your copy or download it from our homepage at [www.cncf.ca](http://www.cncf.ca).

### NEXT STEPS

1. Complete the Giving Fund Application Form.
2. Send the documents to: CNCF  
89 Auriga Drive,  
Ottawa ON K2E 7Z2
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. All donations made to this fund are irrevocable. I/we further understand that my/our communication regarding the Giving 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 signature

The SEAL of the CANADIAN NATIONAL CHRISTIAN  
FOUNDATION is impressed to the right: