

SERVICES FOR FAMILIES & INDIVIDUALS

DONOR ADVISED FUND APPLICATION & AGREEMENT



- Please mail or fax completed form to Give2Asia, 600 California Street, 11th Floor, San Francisco, CA 94108, fax (415) 967-6290. If faxed, please also mail originals.
- For a complete description of Donor Advised Fund services, policies and procedures, please consult the Give2Asia Users Guide, available from www.give2asia.org or by contacting our office.
- All information on this form may be modified at a subsequent date using the Donor Advised Fund Change Request form, also available from the Give2Asia website or by contacting our office.
- Should you have questions, please contact Give2Asia at (415) 967-6300 or email info@give2asia.org.

I. DONOR ADVISED FUND NAME & INTEREST

Please select a name for this Donor Advised Fund, such as the "Smith Family Fund." The name does not have to identify the donor by name and may identify the Fund's main purpose. A letter acknowledging the Fund name accompanies grants unless anonymity is requested when making a grant recommendation.

Fund Name _____

Countries of Interest _____
(for informational purposes only)

Areas of Interest _____
(for informational purposes only)

II. FUND ADVISOR INFORMATION

There may be up to two named Advisors for each Fund, each with full and equal rights to make contributions, recommend grants, and name successors. If there is more than one mailing address, all Fund correspondence will be sent to Advisor one.

Advisor One

Name _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ Evening Telephone _____

Fax _____ Email _____

Preferred Document Delivery Method: Postal Mail Email

Advisor Two

Name _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ Evening Telephone _____

Fax _____ Email _____

Preferred Document Delivery Method: Postal Mail Email

III. FUNDRAISING DONOR ADVISED FUNDS

- Please check here if you intend to use the Donor Advised Fund to fundraise on behalf of an organization or cause.

A \$1,000 set-up fee applies, and must be paid upon establishment of the Fund. Your Fundraising Donor Advised Fund will have a dedicated page on the Give2Asia website describing your Fund to donors, and allowing your Fund to accept online donations. To create your Fund's page at Give2Asia.org, please attach a description of your Fund's charitable purpose (500 words or less). You may also send us 1-2 logo or photo images (format JPG or GIF) to include on your Fund page.

Financial Advisor Information (if applicable)

If you wish to authorize your financial advisor to make recommendations on your behalf on the reallocation of investment pools for this Fund, please provide the following information.

- My financial advisor should receive duplicate quarterly reports and account statements.

Advisor Name _____

Firm _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ Evening Telephone _____

Fax _____ Email _____

Preferred Document Delivery Method: Postal Mail Email

IV. SUCCESSOR INFORMATION

Advisors have the option, upon the death, incapacity, or other disqualification of both named Advisors to the Fund, of allocating a percentage of the remaining assets among the following options. If no selection is made, the remaining assets in the Fund will be transferred to the Friends of Give2Asia Fund. Select any combination of the following as beneficiaries. Percentages are of Fund value and must total 100 percent.

- Friends of Give2Asia Fund (default option)** % _____
The Friends of Give2Asia Fund allows Give2Asia to carry out its work in support of local charitable groups across Asia.

- An Asian Charitable Organization** % _____
Advisors may recommend a qualified Asian charitable organization to receive the remaining proceeds of the Fund. All recommendations of charitable beneficiaries are subject to the approval of the Give2Asia Board, in accordance with its grantmaking policies, at the time the gift would take effect.

Organization _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ *Evening Telephone* _____

Fax _____ *Email* _____

- A Give2Asia Fund** % _____
Transfer remaining assets in the Fund to an existing Give2Asia Fund.

Fund Name _____

- Individual(s) as Successor Advisors.** % _____
Advisors may name up to two individuals as Successor Advisors to the account with full rights as Fund Advisors. Successor Advisors serve for their lifetime and may not name successors.

Advisor One

Name _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ *Evening Telephone* _____

Fax _____ *Email* _____

Advisor Two

Name _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ Evening Telephone _____

Fax _____ Email _____

V. CONTRIBUTION DESCRIPTION

Check or Money Order enclosed payable to Give2Asia \$ _____

Credit Card Donations (U.S. only) \$ _____
Please visit www.give2asia.org for online giving.

Wire Transfer \$ _____

Please contact Give2Asia directly if you would like to make a contribution via wire transfer.

Marketable Securities and/or Mutual Fund Shares (U.S. only)
Please provide the following information to your broker to transfer the securities:

Charles Schwab & Co., Inc.
DTC # 0164, Code 40
Account #: 8697-0768
Account Name: Give2Asia

For all securities transfers, please indicate stock name and number of shares:

Stock Name/Description	Number of Shares
_____	_____
_____	_____

Other: *Please contact Give2Asia staff to discuss contributions of restricted stock or other assets such as real estate.*

VI. TERMS OF AGREEMENT

- I (We) hereby request Give2Asia, a publicly supported Section 501(c)(3) organization (Tax ID: 94-3373670) to establish a Donor Advised Fund (the Fund) on its books as specified in this Application. Give2Asia will apply the assets in the Fund toward the achievement of its charitable purposes as provided in its Articles of Incorporation. I understand that any contribution, once accepted by Give2Asia, represents an irrevocable contribution to Give2Asia and is not refundable to me for any reason. I understand that Give2Asia has exclusive legal control over the assets contributed.
- I agree to read and be bound by the terms and conditions specified in the Give2Asia User's Guide as currently in effect and as amended from time to time. If I do not receive or understand the User's Guide, I will notify Give2Asia.
- I understand that I may make recommendations to Give2Asia about charitable beneficiaries and that these recommendations are advisory and not binding. Give2Asia offers a range of grantmaking options and I understand that there may be program service fees for each. As required by law, Give2Asia may make or withhold any distribution from the Fund at its sole discretion and is not bound by donor recommendations. I understand that I may not make any recommendation for distributions from the Fund that will satisfy any personal economic obligation or pledge or confer any other economic benefit upon me or any members of my family.
- Give2Asia shall invest the principal, capital appreciation, and any undistributed income of the Fund. Give2Asia may make distributions from the income, principal, or realized appreciation of the Fund as Give2Asia in its discretion, determines to be appropriate under the circumstances.
- The administrative fee for the Fund is 1% per annum assessed quarterly (0.25% per quarter) on the Fund's assets. This fee covers the accounting and reporting associated with the Fund.
- If there is more than one Advisor to this Fund, each Advisor has the authority, acting individually and without notice to any other Fund Advisor, to make recommendations to Give2Asia as fully and completely as if the Advisor is the sole Fund Advisor and may make any changes to the Fund (except to remove the other Fund Advisor).
- I understand that all assets of Give2Asia will be held and used as provided in its governing documents, as those documents may be amended from time to time, and as required by federal and California laws governing charities. I hereby certify that, to the best of my knowledge, all information represented in connection with this application is accurate, and I will promptly notify Give2Asia in writing of any changes.

Signature of Fund Advisor _____ *Date* _____

Signature of Fund Advisor _____ *Date* _____