

ADVISED GRANTMAKING AGREEMENT



- Please mail or fax completed form to Give2Asia, 600 California Street, 11th Floor, San Francisco, CA 94108, fax (415) 967-6290. If faxed or emailed, please also mail originals.
- For a complete description of account services, policies and procedures, please consult the Give2Asia Users Guide, available at www.give2asia.org/usersguide or by contacting our office.
- All information on this form may be modified at a subsequent date using the 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. FUND NAME & INTEREST

Please select a name for the Fund, such as "The Smith Fund." The name of the Fund serves as a way to identify your account with Give2Asia. 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. DONOR 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

Give2Asia offers advisors the ability to fundraise with their community and broader public to bring donations into the Fund.

- Please check here if you intend to use the 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.
 - The Fund will have a dedicated page on the Give2Asia website for accepting online donations.
 - Please attach a description for the website (500 words or less). You are also highly encouraged to submit via email any images, logos and video related to this fundraising effort.

IV. INVESTMENT OPTIONS

Give2Asia offers the ability for the Fund to earn investment income.

NOTE: This option is not available if you selected the Fundraising option above.

- Please check here if you wish to have money in the Fund invested in Schwab S&P 500 Equity Index Fund (SWPPX).
- If this choice is selected, you are advising Give2Asia to invest the money in the Fund, with **investment gains and losses affecting the available balance for advised grant making.**
 - The **administrative fee for this option is 1% per annum assessed quarterly (0.25% per quarter)** on the Fund's assets. This fee covers the investment management, accounting and reporting associated with the Fund.
 - **Give2Asia does not recommend this option if the Fund is to be used for a one-time advised grant.**

Donors creating funds with balances in excess of \$500,000 have the option to have the funds managed in an individual investment account.

- Please check here if you are creating a Fund with a balance in excess of \$500,000 and wish to have it managed individually. Give2Asia staff will contact you for further details.

- If this choice is selected, you are advising Give2Asia to invest the money in the Fund, with **investment gains and losses affecting the available balance for advised grant making.**
- The **administrative fee for this option is 1% per annum assessed quarterly (0.25% per quarter)** on the Fund's assets. This fee covers administrative expenses of Give2Asia, in addition an investment management fee may be charged by the fund managers.

V. SUCCESSOR INFORMATION

Advisors have the option, upon the death, incapacity, or other disqualification of both named Advisors to the Fund, of recommending the allocation of a percentage of the remaining assets among the following options. Percentages in this section must total 100 percent. Select any combination of the following as beneficiaries:

- 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 _____

- 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.

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

Fund Name _____

- An Asia-based 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 takes effect.

Organization _____

Street Address _____

City, State, Zip, Country _____

Day Telephone _____ *Evening Telephone* _____

Fax _____ *Email* _____

VI. CONTRIBUTION OPTIONS

I understand that I have the following contribution options at any time:

- Check or Money Order enclosed payable to Give2Asia**
- Credit Card Donations** (U.S. only; credit card processing fees apply)
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.

VII. GIFT RECOMMENDATION (IF ANY)

- Advised Grant to an approved charitable organization.** (Minimum US\$10,000)

Name of Organization _____

Special Project or Purpose of _____

Country _____

Grant Amount \$ _____

Fee Amount* \$ _____

**Please consult the User's Guide or contact Give2Asia staff to determine the fee amount.*

Total Advised Grant Amount \$ _____

- Due Diligence Review** (\$1,000) \$ _____

If the organization is new to Give2Asia, please include contact information for the Due Diligence Review.

Contact Person (if any) _____

Mailing Address _____

City, State/Zone, Country _____

Telephone _____ Fax _____

Email _____

VIII. GRANT ADMINISTRATION & RELATED FEES

I have received a copy of the pricing sheet and acknowledge that I understand the fees associated with making an advised grant or establishing a Donor Advised Fund with investment options. I also understand that Give2Asia may make changes to the fee structure in the future.

IX. TERMS OF AGREEMENT

- I (We) hereby request Give2Asia, a publicly supported Section 501(c)(3) organization (Tax ID: 94-3373670) to establish a 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.
- 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 One _____ *Date* _____

Signature of Fund Advisor Two _____ *Date* _____

Signature of Give2Asia Representative _____ *Date* _____

Printed Name of Give2Asia Representative _____