

Donor Advised Fund Profile

Instructions: Please fill in all required items marked with *. When completed, print and mail it to us along with your initial gift to the address listed above. Questions, please call 1-800-746-8250.

A. DONOR INFORMATION

First Name* Middle Initial Last Name*
Birth Date* E-mail*
Home Address*
City* State* Zip Code*
Home Telephone* Cell Telephone

B. SPOUSE INFORMATION

First Name Middle Initial Last Name
Birth Date E-mail

C. DONOR ADVISED FUND NAME: (Do Not Use 'Foundation' or 'Trust in your fund name)*

D. CONTRIBUTION INFORMATION

Estimated Gift Value* Cash Stock
 Bond Mutual Fund
CUSIP/Ticker or Fund Name Shares

E. RECOMMEND INVESTMENT ALLOCATION

Options (Choose one): Income 20% Equity / 80% Fixed
 Money Market Balanced 40% Equity / 60% Fixed
 High Income 100% Fixed Growth 70% Equity / 30% Fixed

F. ADD ADDITIONAL ADVISORS (Optional)

Name	E-mail	Relationship	Full Rights or View Only
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G. ACCOUNT COMMENT

Tell us how you learned about the Deseret Trust Donor Advised Fund

Check all that apply

- LDS Philanthropies
- Friend or family member
- Professional Advisor
- Publication
- Website or internet search
- Event
- Other

Names of referrals

I would be interested in being contacted by a philanthropic advisor from LDS Philanthropies.

The Deseret Trust Donor Advised Fund Agreement

I/we desire to establish a Donor Advised Fund with Deseret Trust Company. I/we acknowledge that I/we have read the [Deseret Trust Company Rules and Policies](#) Regarding Donor Advised Funds and agree to the terms and or conditions described therein. I/we understand that any contribution, once accepted by Deseret Trust Company, represents an irrevocable gift and is not refundable to me/us.

I/we hereby certify that, to the best of my/our knowledge, all information presented in connection with this agreement and establishment of a Donor Advised Fund at Deseret Trust Company is accurate and that I/we will promptly notify Deseret Trust Company in writing of any changes. I/we acknowledge that I/we did not and will not receive anything in exchange for, or in consideration, of my/our contribution(s) to Deseret Trust Company and that Deseret Trust Company has obtained or will obtain exclusive legal control over the assets contributed, although I/ we, and advisors I/we may appoint, may retain and exercise non-binding advisory privileges in regard to grants from such Donor Advised Fund.

I/we acknowledge and agree that I/we will obtain and rely on independent tax advice regarding the establishment, maintenance and operation of the Donor Advised Fund and that I/we will not rely on legal or tax advice from Deseret Trust Company. I/we acknowledge that, to help the government fight the funding of terrorism and money laundering activities, federal law requires financial institutions, including Deseret Trust Company, to obtain, verify and record information that identifies each person who opens an account, including a Donor Advised Fund, and I/ we agree to provide the identifying information reasonably requested by Deseret Trust Company.

Each of the undersigned acknowledges that he/she has read and understands this Agreement including DTC's Rules and Policies Regarding Donor-Advised Gifts and Program Guidelines attached as [Schedule A](#) to this Agreement, and that he/she agrees to be bound by its terms.

Acceptance* I have read and agree that I accept the terms and agreements of Deseret Trust DonorAdvised Funds' Rules and Policies regarding Donor Advised Gifts.

Signature* Date*

Full Legal Name

Signature Date

Full Legal Name