

New Donor Advised Fund (DAF) Information Form

Opening a fund account with TCF is a simple and easy process. We look forward to working with you to achieve your philanthropic goals. Please complete this form to the best of your ability and return to donorserv@tulsacf.org. A minimum to establish a DAF is \$5,000. Contact us (918-494-8823) or visit www.tulsacf.org for additional information.

About You

Donor(s)/Advisor(s)

This (or these) individual(s) has/have full advisory privileges over the fund, including grant recommendations, investment recommendations, and naming successor advisors.

Donor/Advisor:

Mr. Mrs. Ms. Dr. Other:

_____ First Name	_____ Nickname (if applicable)	_____ Middle Initial	_____ Last name
_____ Home Address	_____ City	_____ State	_____ Zip
_____ Cell Phone	_____ Business Phone	_____ Email Address	
_____ Business Name	_____ Address	_____ City/State	_____ Zip

Additional Donor/Advisor (if applicable):

Mr. Mrs. Ms. Dr. Other:

_____ First Name	_____ Nickname (if applicable)	_____ Middle Initial	_____ Last name
_____ Home Address	_____ City	_____ State	_____ Zip
_____ Cell Phone	_____ Business Phone	_____ Email Address	
_____ Business Name	_____ Address	_____ City/State	_____ Zip

Financial Advisor (if applicable):

_____ Name	_____ Company
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Your Fund Information

Fund Name

Example would be "The Smith Family Fund"

[Click or tap here to enter text.](#)

Publicity Preferences

When a distribution is processed and mailed to a charitable organization, TCF includes the name of the fund and Tulsa Community Foundation on the cover letter and actual check.

Please check this box if you do **NOT** want the name of the fund printed on either the cover letter or the check, thereby maintaining *complete* anonymity.

Periodically, TCF publishes newsletters and various materials for public distribution.

Please check this box if you do **NOT** want the name of your fund published.

Gift Information

Minimum size to establish a Donor Advised Fund (DAF) is \$5,000.

Approximate Gift Amount: [Click or tap here to enter text.](#)

When you are ready to make a gift, please notify us to ensure that your gift is properly delivered. We accept cash, check, wire, ACH, and appreciated securities. Contact us to discuss other gift types.

Investment Advice

Assets of the fund are recommended to be invested in an allocation strategy as follows (select one):

- Money Market
- Income
- Conservative
- Moderate
- Passive Moderate
- Aggressive

Please refer to TCF's Investment Policy for a more detailed description of each of the above options. Any fund with a market value less than \$2,500 will be automatically invested in money market until the market value equals or exceeds \$2,500.

Disposition of Fund Assets

Successor Advisor(s)

Donor(s) may appoint one or more individuals to serve as successor advisors to the fund, who may be a spouse, partner, child, or other heir. These individuals will have the authority to recommend grants and provide investment advice after the death of the last surviving donor or Fund Advisor.

If you do not wish to name successor advisor(s), please write "none."

Successor Advisor

Full Name Address

Phone Relationship

Email Address

Successor Advisor

Full Name Address

Phone Relationship

Email Address

Disposition (select one)

When no successor advisor is named, or after the death of the last successor advisor, it is recommended that any remaining fund assets shall be disposed as follows:

- Unrestricted Fund:** Undistributed assets* should become a permanent fund with income available to meet the future charitable needs of the Tulsa and northeastern Oklahoma area.
- Field-of-Interest Fund:** Undistributed assets* should become a permanent named fund with income available for distributions for charitable purposes similar to those recommended during the donor’s lifetime.
- Endowment Fund:** Undistributed assets* should become a permanent agency endowment fund with income designated to the following nonprofit organization(s): [Click or tap here to enter text.](#)
- Terminating Fund:** Undistributed assets should be distributed outright to the nonprofit organization(s) in the percentages recommended below:

	%	to	
	%	to	
	%	to	
	%	to	

**Funds with asset balances of less than \$10,000 will become part of the foundation’s operating endowment.*

Estate Planning

Tulsa Community Foundation has helped generations of donors create a lasting effect on their communities through charitable giving. If you have already included your fund in your estate plans, please complete the following section. We appreciate the trust you are placing in TCF to steward your charitable giving.

As an expression of my/our commitment to the community, I/we are pleased to declare my/our intention to make a gift to our fund at TCF through a:

- Will
- Living Trust
- Retirement plan
- Life Insurance policy
- Charitable remainder trust
- Other: [Click or tap here to enter text.](#)

If possible, please attach a copy of the page(s) from your will or other document that references your intended gift.

Today, the estimated amount of this gift is \$ [Click or tap here to enter text.](#) (Estimate of gift amount will be used internally only for long-term planning purposes.)

Although this letter of intent is an expression of my/our current plans, I/we understand that those plans may change and that this declaration is not legally binding.

- I would like to learn more about how I may include my Donor Advised Fund in my estate plan.

Referral Information

We greatly appreciate all who make referrals to Tulsa Community Foundation. If you were referred to us, please share their name(s):

Disclaimer

- I/We acknowledge that this form is not a legally binding contract. TCF will use this information provided to draft a formal fund agreement between me/us and the foundation. Once the agreement is finalized, all parties will then execute that fund agreement as a legally binding contract.

Questions?

We're here to help.

Contact us at 918-494-8823 or donorserv@tulsacf.org if you need more detailed information.

