

3 PROFESSIONAL ADVISOR INFORMATION (IF APPLICABLE)

If you work with a professional advisor that you wish to have access to your Fund, please fill out the following section (*attach an additional sheet if you have more than one professional advisor*). If you do not wish for your professional advisor to have access, leave this section blank.

Type of Advisor: (Circle One) Accountant Attorney Financial Planner Investment Manager Other (*Specify*)

Professional Advisor Name & Firm Name

Mailing Address

City

State

Zip

Phone

Email

I authorize my advisor to recommend grants from the Fund: Yes No (*if no box is checked, we will assume "No"*)

4 CONTRIBUTION INFORMATION

The suggested initial contribution to establish a Giving Fund is \$10,000. Please refer to NCF's Program Guidelines for information on the types of gifts NCF can accept.

Please check the type of contribution you will be making:

Check(s) in the amount of \$ _____
Check(s) should be made payable to "The National Christian Foundation" ***Insert Fund Name in Memo on Check***

Wire in the amount of \$ _____
Please contact NCF for wiring instructions.

Assets to be gifted at a later time via testamentary gifting
Please contact NCF for more information or download "Testamentary Gift Information" from our website.

A nonliquid gift (as defined in Program Guidelines)
Please contact NCF for more information or download "Asset Transfer Instructions" from our website.

Publicly traded securities or mutual fund shares
Name of stock or mutual fund: _____
Number of shares: _____
To initiate transfer, visit the "Forms & Reports" section of our website or contact NCF for instructions.

5 INVESTMENT INFORMATION

Anticipated Fund Balance (Select One): Less than \$100,000 Greater than \$100,000

Your Giving Fund balance may be invested, dependent upon the size of your Fund, providing opportunity for financial growth. Please note that if a Fund's balance is under \$50,000, it will be a "Stable Value Fund" with no monthly administrative costs, gains, or losses posted. If at any time the Fund's balance goes over \$50,000, the balance will automatically be invested according to the pool you select below, and standard administrative costs will apply. If the balance again drops below \$50,000, the Fund will once again be a "Stable Value Fund." **Please select one investment pool. You can select up to two pools if your Fund balance will be \$100,000 or greater.** Percentages must total 100%.

____% **Money Market:** Lower risk, Money Market Fund Rates

____% **Bond:** Income Producing

____% **Conservative:** 40% Equities, 60% Bond Funds

____% **Balanced:** 50% Equities, 50% Long-Term and Short-Term Bonds & Money Market Funds

____% **Growth:** 60% U.S. Equities, 20% International Equities, 20% Intermediate Bonds & Money Market Funds

6 SUCCESSOR ADVISOR INFORMATION

In the event of your death or incapacity, or the termination of your organization, you may wish to provide NCF with a “succession plan” for the Giving Fund you have established. There are four ways to divide the remaining assets in the Fund, and you may select any one of these, or a combination of some or all. Combinations must total 100% in the far right column. If you do not list percentages for your successors below, NCF will accept advice from one or all of the successor advisors on your current Fund.

- A. **Name successor Advisors** - You may wish to place some or all of the assets from your existing Fund into a new Fund(s) for others (such as your heirs) to distribute to charity.
- B. **Distribute to ministry work** - You may wish to recommend grants to your church or favorite ministries, granting out some or all of the assets in your Fund. This may also be granted over a period of time. *Please attach specific instructions, if this is your recommendation.*
- C. **Distribute to NCF’s ministry** - You may wish to recommend a grant to support the ministry of The National Christian Foundation as we seek to further the Gospel of Jesus Christ by educating, encouraging and equipping faithful stewards to give wisely.
- D. **Create an NCF Legacy FundSM** - You may wish to establish a Legacy Fund. If you desire greater accountability on the ministries chosen for funding or oversight for your successor advisors (Legacy Advisory Committee), a Legacy Fund may be for you. A Legacy Fund is an enhanced type of Giving Fund in which NCF assumes greater responsibility to ensure that your giving intent and granting desires are carried out faithfully after you are gone. Visit “NCF Legacy Fund” on our website or call NCF for more information.

NAME SUCCESSORS FOR YOUR FUND

(A new Giving Fund will be created for each. If no percentages are entered, NCF will accept advice from one or all of the successor advisors.)

_____ Successor Advisor A - Name, Address, City, State, Zip, Phone	<input type="text"/> %
_____ Successor Advisor B - Name, Address, City, State, Zip, Phone	<input type="text"/> %

If you need to add additional names or organizations, please use a separate sheet of paper.

DISTRIBUTE PERCENTAGE TO MINISTRY WORK

_____ Organization Name, Address, City, State, Zip, Phone	<input type="text"/> %
_____ Organization Name, Address, City, State, Zip, Phone	<input type="text"/> %

If you need to add additional names or organizations, please use a separate sheet of paper.

DISTRIBUTE PERCENTAGE TO THE MINISTRY OF THE NATIONAL CHRISTIAN FOUNDATION

CREATE AN NCF LEGACY FUND

If you enter a percentage in the column on the right, an NCF staff member will contact you to explore this option.

Must total 100% **TOTAL:** %

