

Welcome to the Donor Advised Fund application!

- This process should take about 15 to 20 minutes to complete.
- All applicants must be US residents and be at least 18 years of age.
- You can view complete program details before you apply. Helpful information is available by mail or via website: <http://www.efca.org/foundation/daf/>
- Be sure to review the requirements before beginning the application.
- Thank you. Contact us if you have any questions.

Starting the Application

Print out this document (10 pages): Includes this cover page and the *Fund Agreement Establishing a Donor Advised Fund with the EFCA Foundation*. Or, if you prefer, we can mail this document to you.

Review and complete the Fund Agreement.

Fund Agreement (pages 1, 2, and 3)

1. Summarizes the DAF gift plan in detail.
2. Add the date on Page 1
3. Each donor should sign on page 3

Exhibit A (pages 4 and 5):

1. Name Your Fund
2. Provide Donor Contact Information.
3. Be sure to include your SS# or Taxpayer ID Number(s).
4. Identify your Fund's Advisor(s)
5. If desired, name a Successor Advisor. (optional)

Exhibit B (pages 6 and 7):

1. Recommend Grants to Ministries and Charities
2. Provide essential details about the Ministries and Charities.
Address information needed since many organizations have similar names. We want to be certain we fully honor your charitable requests without delay.
3. Sign and date Page 6. (All grant recommendations must be in writing and be signed and dated.)

Exhibit C: (page 8)

1. Recommend how you wish the funds to be invested
2. State your general plans for grant making. This aids us with investment decisions

Exhibit D: (page 9) - FOR OFFICE USE ONLY

Mail completed DAF Agreement to the EFCA Foundation

Address: EFCA Foundation, 901 E 78th Street, Minneapolis, MN 55420

Contribution Option: You may contribute to your DAF now, make check out to **EFCA Foundation** and **add memo "to fund new donor advised fund"**.

What to Expect

Once you have submitted your application, we will notify you if the fund agreement can be approved or if other information is needed to complete the application. Please contact us at foundation@efca.org or toll free at 800-995-8578.