



San Francisco, CA
 T: 415.561.3900 | F: 415.561.3919
 rsfsocialfinance.org

AGREEMENT FORM Donor Advised Funds

INSTRUCTIONS

Return by email to PS@rsfsocialfinance.org, by fax to 415.561.3919, or by mail to RSF Social Finance, P.O. Box 2007 San Francisco, CA 94126.

QUESTIONS?

Contact the Philanthropic Services team at PS@rsfsocialfinance.org

I. TELL US ABOUT YOU

To establish a Donor Advised Fund at RSF Social Finance (RSF), please complete and return this form along with your initial contribution according to the instructions above.

Once the Fund is established, you may recommend grants to qualified charitable organizations. If two donor advisors are named, we will accept grant recommendations from either donor advisor unless otherwise specified.

Be aware that RSF cannot honor recommendations that result in any benefit to you, a family member or related parties, such as event tickets or memberships.

If you need additional forms or have any questions, please contact us at 415-561-3900 (press 3 for the department directory, press 3 again to reach Philanthropic Services), or you may download forms from our website at rsfsocialfinance.org/daf.

DONOR ADVISOR NAME

MAILING ADDRESS

CITY STATE ZIP

PHONE

E-MAIL ADDRESS

BIRTHDATE

JOINT DONOR ADVISOR NAME

MAILING ADDRESS

CITY STATE ZIP

PHONE

E-MAIL ADDRESS

BIRTHDATE

II. NAME YOUR DONOR ADVISED FUND

You may give the Donor Advised Fund a name that reflects your charitable intentions, or identifies you, or is in honor of another. A letter naming the Fund will accompany each grant from the Fund unless you prefer to remain anonymous.

NAME OF DONOR ADVISED FUND

How did you hear about us?

- FOOD & AGRICULTURE
- EDUCATION & THE ARTS
- CLIMATE & ENVIRONMENT
- THE WORK OF RUDOLF STEINER
- SOCIAL FINANCE
- SOCIAL JUSTICE
- OTHER: _____

III. YOUR INTEREST AREAS

Please indicate which aspect(s) of RSF's mission are of particular interest to you. This information helps us to better understand and serve our clients.

Do you plan to make grants to international organizations? YES

NO

IV. NAME A SUCCESSOR OR BENEFICIARY

As the donor advisor(s), you have the right to make recommendations as to Fund investments and grants. You may (but are not required) to name a successor advisor to take your place upon your death. Alternately, you may name a qualified charitable organization to receive the remaining balance of your Fund.

If you wish to name additional or different successors or beneficiaries, please contact us at 415.561.3900.

SUCCESSOR BENEFICIARY

SUCCESSOR ADVISOR OR BENEFICIARY NAME

MAILING ADDRESS

CITY

STATE

ZIP

PHONE

E-MAIL ADDRESS

RELATIONSHIP TO DONOR (FOR SUCCESSOR ONLY)

BIRTHDATE

V. MAKE A CONTRIBUTION

Initial donations to RSF are accepted in the amount of \$5,000 or more in the form of a check, wire transfer, or marketable securities (i.e. stocks and bonds) and/or mutual funds shares. Subsequent donations can be as little as \$500. All contributions are irrevocable.

For wire transfer instructions, or for information on donating securities or other property, please contact us at 415.561.3900.

CHECK ENCLOSED PAYABLE TO RSF IN THE AMOUNT OF: \$ _____

WIRE TRANSFER IN THE AMOUNT OF: \$ _____

SECURITIES OR OTHER PROPERTY: _____

VII. SIGNATURES

By signing this application, I acknowledge that any contribution to this Donor Advised Fund, once accepted, is an irrevocable donation to RSF, who has final authority as to all investment and grantmaking decisions and exclusive legal ownership and control over all gifts. I or any successor advisor has the right only to make nonbinding recommendations respecting investment or grantmaking, as described in the Donor Advised Fund Program Guide.

DONOR ADVISOR SIGNATURE

PRINT NAME

DATE

By signing this agreement jointly, you agree that any Joint Advisors have equal advisory rights over the Fund.