

# DONOR ADVISED FUND APPLICATION

Welcome to the Minneapolis Foundation! We are pleased to offer convenient, customized giving solutions that enable donors like you to direct and fund your charitable passions. Our experienced professionals will manage your fund to grow for maximum impact.

Please review The Foundation's Donor Advised Fund policies prior to completing your application. Applications may be submitted by e-mail, fax, mail or hand delivery:

800 IDS Center | 80 South Eighth Street  
Minneapolis, MN 55402  
Fax: 612.672.3846

To submit your application through e-mail, please complete the application by typing in your information, then save the form to your computer. Attach your saved PDF form to an e-mail addressed to Steph Donley, Philanthropic Advisor, at [sdonley@mplsfoundation.org](mailto:sdonley@mplsfoundation.org).

## DONOR ADVISOR INFORMATION

Please provide information about the primary donor(s) to your fund.

### *Donor 1 (default recipient for all account correspondence)*

Full Name (First, Middle, Last)			Home Phone	Mobile Phone	Business Phone
Date of Birth	Email		Employer	Title	
Home Address			Employer Address		
City	State	ZIP Code	City	State	ZIP Code

### *Donor 2*

Full Name (First, Middle, Last)			Home Phone	Mobile Phone	Business Phone
Date of Birth	Email		Employer	Title	
Home Address			Employer Address		
City	State	ZIP Code	City	State	ZIP Code

## FUND INFORMATION

Tell us about the fund you would like to establish so we can provide you with customized support.

### Proposed Name of Fund

Name cannot be more than 55 characters, including spaces, and is subject to the Foundation's approval.

\$

### Initial Gift Amount

Minimum gift of \$10,000

Funds larger than \$1 million can be designated as Signature Funds - contact us for more information.

### Form of initial gift:

- Personal Check                       Life Insurance  
 Real Estate                             Credit Card  
 Publicly Traded Stock               Unsure  
 Other: \_\_\_\_\_

### I plan to make gifts through my estate plan:

- Will or Revocable Trust               Gift Annuity  
 Charitable Trust                       Life Insurance  
 Retirement Plan Assets               Unsure  
 Other: \_\_\_\_\_

### Other fund information:

- I plan to make additional gifts to my fund over time.  
 I plan to suggest others make gifts to my fund.  
 I would prefer all grants from my fund to be anonymous.  
 You may list my fund by name in the annual report.  
 I would like access my fund online through DonorView.

## PRIMARY ADVISOR(S)

Identify the primary advisor(s) to the fund — typically they are also the primary donor(s). They will have the authority to recommend grants, recommend asset allocations, view fund information and name successors.

### Primary Advisor 1

- Same as Donor 1                       Income Only     Principal + Income

Full Name (First, Middle, Last)

Home Phone

Mobile Phone

Business Phone

Date of Birth

Email

Employer

Title

Home Address

Relationship to Donor

City

State

ZIP Code

### Primary Advisor 2

- Same as Donor 2                       Income Only     Principal + Income

Full Name (First, Middle, Last)

Home Phone

Mobile Phone

Business Phone

Date of Birth

Email

Employer

Title

Home Address

Relationship to Donor

City

State

ZIP Code

## SUCCESSOR ADVISOR(S)

You may name individuals as successor advisors to succeed you in advising on the fund after the death of the last primary advisor. These recommendations can be changed at any time.

**Successor Advisor 1**

1st Generation Successor  Income Only  Principal + Income

\_\_\_\_\_  2nd Generation Successor  There is no successor advisor  
Full Name (First, Middle, Last)

\_\_\_\_\_  2nd Generation Successor  
Date of Birth Email Home Phone Mobile Phone Business Phone

\_\_\_\_\_ Home Address Employer Title

\_\_\_\_\_ City State ZIP Code Relationship to Donor

**Successor Advisor 2**

1st Generation Successor  Income Only  Principal + Income

\_\_\_\_\_  2nd Generation Successor  
Full Name (First, Middle, Last)

\_\_\_\_\_ Date of Birth Email Home Phone Mobile Phone Business Phone

\_\_\_\_\_ Home Address Employer Title

\_\_\_\_\_ City State ZIP Code Relationship to Donor

## FUND CONTINUITY

It is important to establish what you wish to have happen with the principal and/or income of your fund following the death of your last advisor. As the primary donor, you may establish a continuity plan to ensure that your fund continues to support causes that are important to you, even when you and/or your successor advisors are no longer here. Your Philanthropic Advisor would be happy to assist you in determining a continuity plan that works best for you.

***Following the death of the last advisor, I would like the fund to be:***

- Unsure at this time  Unrestricted  
 Legacy  Designated Beneficiary

***If you selected "legacy," please identify which fields of interest you would like to support:***

\_\_\_% Animal Welfare      \_\_\_% Education      \_\_\_% Immigrants & Refugees  
\_\_\_% Arts & Culture      \_\_\_% Environment      \_\_\_% International Development & Relief  
\_\_\_% Children & Youth      \_\_\_% Health      \_\_\_% Justice, Equality & Civic Engagement  
\_\_\_% Community Endowment      \_\_\_% Housing & Human Services      \_\_\_% Senior Services

***If you selected "designated beneficiary," please identify your selected beneficiaries:***

\_\_\_% \_\_\_\_\_ % \_\_\_\_\_  
\_\_\_% \_\_\_\_\_ % \_\_\_\_\_  
\_\_\_% \_\_\_\_\_ % \_\_\_\_\_