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THIS AGREEMENT, made this \_\_\_\_ day of \_\_\_\_\_, 202\_\_, between **In His Steps Foundation** ("Donee") and \_\_\_\_\_ ("Donor").

WHEREAS, the Donor has a desire to transfer assets to be managed under the name of the below named fund of In His Steps Foundation (IHS Foundation), for the purpose of charitable giving to qualified organizations; and

WHEREAS, it is desirable for administrative convenience and economy for the Donor to transfer the assets and IHS Foundation is willing to receive, invest and manage such assets, and pay out the income, growth and/or principal in accordance with the purpose of this agreement.

**What would you like to name your fund?** \_\_\_\_\_

You may want to use a family name (i.e. Smith Family Fund), a biblical name (Good Shepherd Fund or Matthew 23 Fund), a purpose-based name (Feeding the Hungry Fund) or a name that is important to you.

### Primary Fundholder

\_\_\_\_\_  
Title      First Name      Middle Initial      Last Name

\_\_\_\_\_  
Date of Birth      Address (P.O. Box or Street)      City      State      Zip

\_\_\_\_\_  
Home phone      ☐ Cell or ☐ Business phone      Email

Preferred Method of Receiving Quarterly Statements:

☐ Physical Mail    ☐ Email

### Additional Fundholder (optional)

\_\_\_\_\_  
Title      First Name      Middle Initial      Last Name

\_\_\_\_\_  
Date of Birth      Address (P.O. Box or Street)      City      State      Zip

\_\_\_\_\_  
Home phone      ☐ Cell or ☐ Business phone      Email

Preferred Method of Receiving Quarterly Statements:

☐ Physical Mail    ☐ Email

NOW, THEREFORE, in consideration of the foregoing, the parties agree as follows:

- 1) The Donor does hereby transfer, assign, and convey to IHS Foundation, and IHS Foundation hereby accepts all funds and/or property receivable into the Fund to be held, managed and administered by IHS Foundation for the purpose herein set forth.
- 2) The income and/or principal of the Fund shall be used only in accordance with the above stated purpose.
- 3) You are invited to establish an optional Advisory Committee. An Advisory Committee member is somebody you authorize to act on the Fund. They may receive statements, make contributions, and recommend grants from the fund just like a Primary Fundholder. Some people add grown children, financial advisors, or trusted partners to their Advisory Committee.

The initial member(s) of the Advisory Committee are:

## Advisory Committee Name 1 (optional)

_____	_____	_____	_____	_____
Title	First Name	Middle Initial	Last Name	
_____	_____	_____	_____	_____
Date of Birth	Address (P.O. Box or Street)		City	State Zip
_____	_____	_____	_____	_____
Home phone	<input type="checkbox"/> Cell or <input type="checkbox"/> Business phone	Email		
Relationship to Donor: <input type="checkbox"/> Spouse <input type="checkbox"/> Child Other: _____				
Notes: _____				

## Advisory Committee Name 2 (optional)

_____	_____	_____	_____	_____
Title	First Name	Middle Initial	Last Name	
_____	_____	_____	_____	_____
Date of Birth	Address (P.O. Box or Street)		City	State Zip
_____	_____	_____	_____	_____
Home phone	<input type="checkbox"/> Cell or <input type="checkbox"/> Business phone	Email		
Relationship to Donor: <input type="checkbox"/> Spouse <input type="checkbox"/> Child Other: _____				
Notes: _____				

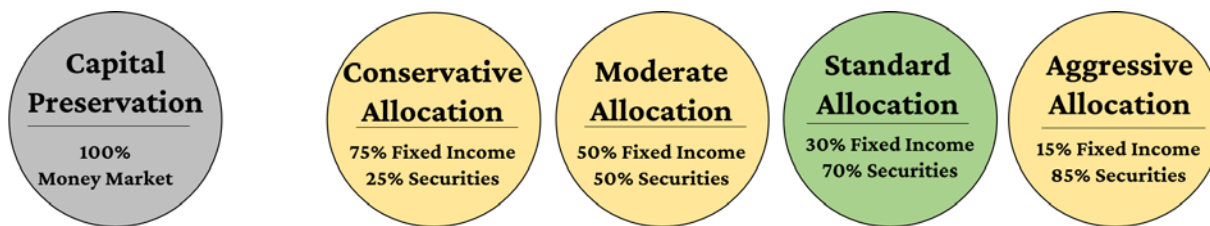
In the event of the death or inability of all the above-named members (Primary Fundholder(s) & Advisory Committee members), the Board of Trustees of IHS Foundation shall serve as such, until replacements can be selected by the Board of Trustees.

- 4) IHS Foundation shall receive, review, and consider written recommendations from the Primary Fundholder(s) & Advisory Committee concerning grants made from the Fund. The final decision concerning such matters shall be made by the Board of Trustees of IHS Foundation.
- 5) For ***Invested Donor Advised Funds***, IHS Foundation charges a quarterly fee for its services in addition to outside services. Such fees, currently 1.25% annually (applied quarterly at .3125% of the Fund's balance) shall be according to a schedule approved by the Board of IHS Foundation and shall be taken from the balance of the Fund. For Funds with a balance larger than \$1,000,000 a declining fee schedule may be offered. For ***Simple Donor Advised Funds***, IHS Foundation charges either a fee of .5% annually (applied quarterly at .125% of the Fund's balance) or \$100 annual fee, whichever is greater. A Simple Donor Advised Fund is placed in our money market account which earns no interest/growth but is not exposed to market volatility and is not subject to loss.

**I would like my newly created Donor Advised Fund to be a(n)**

☐ *Simple* Donor Advised Fund    ☐ *Invested* Donor Advised Fund

**Please mark** where you would like your Fund invested. You can always change your investment preference by writing the foundation and asking to do so.



***Simple Donor Advised Funds*** earn no interest in our money market.

***Invested Donor Advised Fund Only:*** We invite you to determine how your account's funds are invested. Our Investment Committee recommends the "Standard Allocation" as the default allocation for our fundholders. This 30/70 ratio limits exposure to market volatility while pursuing long-term growth.

Invested Donor Advised Funds with a balance greater than \$100,000 may invite an outside financial advisor to manage the assets insofar as the financial advisor is capable of adhering to the investment principles of the foundation.

- 6) If the purposes of the Fund are no longer possible to attain for whatever reason, the Fund shall be used for such related purposes as IHS Foundation's Board, in consultation with the Primary Fundholder(s) & Advisory Committee, shall determine to be appropriate, proper and legally permissible, consistent with IHS Foundation's charitable purposes.
- 7) No income or principal of the Fund shall be used for any purpose or paid to any beneficiary if such use or payment would not be permitted by the Internal Revenue Code ("the Code") or regulations thereunder for an organization described in section 501(c)(3) of the Code, to which contributions are deductible under section 170(c)(2) of the Code. This agreement may not be changed or modified except for the Fund or IHS Foundation to comply with requirements of the Code or Regulations thereunder. In addition, no income or principal of the Fund shall be used for any purpose contrary to the bylaws detailed in the IHS Foundation Code of Regulations.

Signed: \_\_\_\_\_ (Donor)      For IHS Foundation: \_\_\_\_\_  
 \_\_\_\_\_ (Donor)      Rev. Dr. Benjamin Lee  
    President  
    In His Steps Foundation

Date: \_\_\_\_\_

**Method of Initial Funding:**

☐ Cash/Check: \$\_\_\_\_\_

☐ Non-Cash (please describe): \_\_\_\_\_

**"Securities"** refers to tradeable financial assets. In our holdings we own stock in carefully curated companies that meet our "Biblically Responsible Investing" standards. Securities have greater potential for growth but are also susceptible to market loss.

**"Fixed income"** refers to investments - typically in bonds - that can offer slower and steadier growth, but with less susceptibility to market loss.

**"Money Market"** refers to cash-only holdings. You will not see any growth in your money market funds but you will also not see any loss.