

Name of Fund: _____
 Type of Fund: _____
 Endowment (long term) Spenddown (short term)
 Donor Permits Publicity: Yes No
 Administrative Fee: _____



ESTABLISHING YOUR FUND/DIRECTING YOUR GIFT

SECTION 1: DONOR INFORMATION

IF DONOR IS AN INDIVIDUAL (not an organization)

Name: _____
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Home Phone: _____ Business Phone: _____ Cell Phone: _____
 Email: _____ Date of Birth: _____
 Are you the Primary Contact for this Fund? Yes No
You may contact me by any of the following: Email Cell Phone Home Phone Business Phone Mail

INDIVIDUAL DONOR # 2

Name: _____
 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Home Phone: _____ Business Phone: _____ Cell Phone: _____
 Email: _____ Date of Birth: _____
 Are you the Primary Contact for this Fund? Yes No
You may contact me by any of the following: Email Cell Phone Home Phone Business Phone Mail

IF DONOR IS AN ORGANIZATION (Non-profit, Corporation, Partnership, Limited Liability Company, etc.)

Name of Organization: _____
 We are a (circle one): non-profit, corporation, partnership, LLC, unincorporated association, other:

 Mailing Address: _____
 City: _____ State: _____ Zip: _____
 Organization Phone: _____ Fax: _____ Email: _____
 If your organization has a website: _____
 Our chief executive officer is: _____
 Until further notice, the primary contact for this Fund is: _____

Primary contact's email address (if different from above): _____

If the primary contact person changes, please update your contact information.

SECTION 2: CONTRIBUTIONS

The Pinebelt Foundation will help you create a new fund for a charitable purpose (NEW FUND), or you may contribute to an existing fund managed by the Pinebelt Foundation (EXISTING FUND). If you wish to establish a NEW FUND, please go to Section 2A. If you or your organization wishes to contribute to an EXISTING FUND, please go to Section 2B of this Agreement.

SECTION A: CREATING A NEW FUND & INITIAL CONTRIBUTION

If you are establishing a new fund, you have several options. You can establish an endowed fund (\$10,000 or more) or a Spenddown Fund (\$1,000 minimum). You also may choose among several types of funds which we manage. Please indicate your choice below:

MINIMUM CONTRIBUTIONS FOR ENDOWMENT & SPENDDOWN FUNDS:

An Endowment Fund requires a threshold of \$10,000 which can be paid initially or in installments (of at least \$1,000) over time (not exceeding 10 years). The minimum for a Spenddown Fund is \$1,000.

ADDITIONAL CONTRIBUTIONS:

You may make additional contributions to the Fund at any time, and other people may contribute to your Fund unless you restrict it. The Foundation reserves the right to set minimum contributions for ease of administration.

Donor Advised Fund (DAF) \$_____ (amount of initial gift)

With a DAF, you get the tax deduction when the contribution is received and accepted by the Foundation, and you can recommend to the Foundation later which charitable cause you wish to receive distributions in a given year.

See Addendum A for more details.

Donor Designated Fund \$_____ (amount of initial gift)

With a Donor Designated Fund, you get the tax deduction when the contribution is received and accepted by the Foundation, and you designate which organization(s) should receive distributions from your Fund.

See Addendum A for more details.

<i>Name and Address of Organization(s)</i>	<i>Distribution by %</i>
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
	TOTAL: 100%

Field of Interest Fund \$_____ (amount of initial gift)

With this type of fund, you get the tax deduction when the contribution is received and accepted by the Foundation, but you leave it up to the Foundation to distribute payments to charitable causes operating in a particular context, such as animal protection, housing, education, environment, foster children, etc. We call this a "field of interest" as opposed to a specific charity.

See Addendum A for more details.

**Describe the area(s)
of interest you'd like to help:**

Agency Fund \$_____ (amount of initial gift)

A charitable organization can establish a fund that will benefit itself. All of the distributions will go to the organization that establishes this fund.

See Addendum A for more details about an Agency Fund.

Scholarship fund \$_____ (amount of initial gift)

With a Scholarship Fund, you get the tax deduction when the contribution is received and accepted by the Foundation. We will help you establish guidelines and procedures for scholarships that comply with federal law. A Scholarship Committee will select beneficiaries, and we will disburse money for tuition and fees directly to established institutions.

See Addendum A for the more details about a Scholarship Fund.

_____ (Please initial) I acknowledge that I have received and reviewed the PineBelt Foundation's "**Scholarship Guidelines and Procedures**," which describes in general terms the special IRS rules that govern scholarship funds.

I/We wish to establish a Scholarship Fund to be called: _____

I/We wish to contribute to an existing scholarship fund managed by the Pinebelt Foundation whose name is _____.

Please List the Criteria for the recipients of the Scholarship:

SECTION B: CONTRIBUTE TO AN EXISTING FUND

The Pinebelt Foundation has several existing funds to which you can contribute. You will receive a tax deduction when your gift is received and accepted by us. Please select the fund or funds below:

The Pine Belt Community Fund. This is a general unrestricted fund designed to meet community needs as determined by the Foundation's Board from year to year. \$_____ (amount of initial gift)

Partners of the PineBelt Foundation Fund. These gifts are spent annually to cover the majority of the Foundation's operating costs, which keeps our administrative costs low. We hope you will consider a gift to this fund. \$_____ (amount of initial gift)

Greater PineBelt Community Foundation Endowment Fund. This is an endowed (permanent) Fund that supports the Foundation's operating budget. This Fund allows us to do more and keep our administrative fees low. \$_____ (amount of initial gift)

- One of the Currently Managed Funds at the Greater PineBelt Community Foundation.** The PineBelt Community Foundation manages numerous Funds; please see our website to contribute to any of our Endowed or Spenddown Funds: www.PineBeltFoundation.org. \$_____ (amount of initial gift)

SECTION C: PUBLIC RELATIONS AND PUBLICITY ISSUES

We are proud of the Foundation's efforts to improve lives and believe that your gift will motivate and inspire others to be generous. To that end, when we make a grant from your fund, we normally provide a letter identifying the name of the fund and the name of the donor(s) recommending the grant, unless you request anonymity. In addition, Fund and/or donor(s) names are often listed in other PineBelt Foundation communications.

- The Foundation may list the **Fund name** in any PineBelt Foundation communications.
- The Foundation may list the **donor's name** in any PineBelt Foundation communications.
- I/We prefer that grants from the above **Fund name** shall **remain anonymous**.
- I/We prefer that the **donor's name** shall **remain anonymous**.

SECTION 3: RULES GOVERNING DISTRIBUTIONS

You may select either an endowment fund or a spenddown fund. All distributions are subject to the PineBelt Foundation's variance power as described in Addendum D (Fund Terms and Conditions). Any limitations to this power must be specified at the time your Fund is established.

Please choose either an Endowment or Spenddown Fund & indicate distribution options:

Endowment Fund. With this type of fund, the Foundation strives to preserve the fund perpetually or for a designated term of years. Donors may request us to maintain the principal in perpetuity or for a defined period of time, and may request us to make no distributions until sufficient assets have been accumulated to achieve a designated purpose. We will not distribute funds until your fund has accumulated at least \$10,000 in capital. These funds are invested with our long term investment pool and comingled with other PineBelt Foundation endowment assets. We prorate the earnings of the commingled investment among all of the commingled Endowment Funds.

- No distributions shall be made until the fund reaches \$_____ (not less than \$10,000).
- Follow the PineBelt Foundation's Investment & Spending Policy – currently set at 4% per year (*the objective is to provide a stable and predictable flow of grants, despite market volatility. The rate is determined from time to time by the Investment Committee based on market conditions*).
- Other instructions: _____

Spend Down Fund: Spenddown Funds allow donors to spend the principal down to zero. The minimum to open a spenddown fund is \$1,000.

- There are no restrictions on the amount of distributions.
- Distributions of \$_____ shall be made over a period of _____ years.

Other instructions: _____

SECTION 4: FUTURE PLANNING

4A: Donor Advised Funds – Choosing a Successor

If you establish a Donor Advised Fund, you need to decide what happens when the original advisor(s) is no longer alive or able to advise the Foundation. You may name a Successor who will act in your place as the Advisor, or you may provide that when you are no longer willing or able to serve as Advisor, your fund shall be transferred to and become part of another fund managed by the Foundation. If you wish to name a successor Advisor, please see **Addendum B**. If you wish to select a successor Fund after you are no longer advising your fund, please see **Addendum C**.

4B: Planned Gifts

I am willing to consider the following types of gifts:

- Include the PineBelt Community Foundation in my/our Will or Trust
- Name the PineBelt Foundation as a beneficiary of my/our retirement plan or life insurance policy
- Charitable Remainder Trust Charitable Lead Trust
- Securities, Publicly Traded Personal Property
- Other _____

You may acknowledge my planned gift in the PineBelt Foundation’s communications.

**Please note: Gifts are not effective until approved by the PineBelt Foundation’s Funds Acceptance Committee and tax deductions are only available to the extent gifts meet the requirements prescribed by the Internal Revenue Code.*

SECTION 5: Professional Advisor Information

Are you working with a professional advisor? If so, please provide the information requested below.

<input type="checkbox"/> Attorney	<input type="checkbox"/> CPA	<input type="checkbox"/> Financial Planner	<input type="checkbox"/> Other
Professional Advisor’s Name: _____			
Company Name: _____			
Mailing Address: _____			
City: _____ State: _____ Zip: _____			
Phone: _____ Email: _____			
<input type="checkbox"/> I/We authorize the PineBelt Foundation to exchange information about my gift with this advisor(s).			
<input type="checkbox"/> I/We have additional advisors and have included an addendum with their contact information.			

For more information, call the PineBelt Foundation at 601.583.6180 or email: contact@PineBeltFoundation.org

Inspiring Charitable Giving...Investing in Our Communities.

SECTION 6: Acknowledgement & Signature

I acknowledge that I have read this Agreement, the pertinent information in various Addenda, and specifically Addendum D "Fund Terms & Conditions" all of which are part of this Agreement, and I agree to the terms and conditions set forth herein and therein. I understand that any contribution, once accepted by the PineBelt Foundation, represents an irrevocable gift to the PineBelt Foundation and is not refundable to me.

Yes No **I have received and approve of the Fund Terms & Conditions in the "Addenda to the Fund Agreement"**

I understand the fee will be: _____

I understand that all Funds established at The Greater PineBelt Community Foundation are subject to the Foundation's variance power (see page 6 of Addendum D).

Donor 1 Signature: _____ Date: _____

Please Print: _____

Donor 2 Signature: _____ Date: _____

Please Print: _____

Name of Organization (if donor is an organization): _____

By: _____
Title Date

The Greater Pinebelt Community Foundation

BY: _____ Date _____

Theresa Erickson, Executive Director
1507 Hardy Street, Suite 208, Hattiesburg, MS 39401
OFFICE: 601-583-6180 // FAX: 601-583-6188
Federal Tax ID Number: 721390352

SECTION 7: HOW DID YOU LEARN ABOUT THE PINEBELT FOUNDATION?

I/We learned of the PineBelt Foundation through: (Check all that apply)

- Print Advertisement
- Existing Donor (name optional) _____
- Radio Spot
- Word of Mouth
- Media
- Foundation Presentation/Speaking Engagement (event name optional)
- Advisor Recommendation (name optional) _____

*other*_____

Please Send Completed Forms to:

The Greater PineBelt Community Foundation
1507 Hardy Street, Suite 208, Hattiesburg, MS 39401