



## GIVING FUND APPLICATION

The Donors of the account have full and equal rights to recommend grant distributions and to elect the successors of the account. If there is more than one mailing address, all account correspondence will be sent to Donor #1. There can be more than two Donors. (Please attach additional sheets if necessary.) Mail completed mailing form to the address at the end of this document.

DONOR #1 (Primary recipient for all account communication)	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Other	
NAME (First, Last)/ ORGANIZATION	
NAME OF RESPONSIBLE PARTY	
MAILING ADDRESS	
CITY/ STATE/ZIP	
CONTACT #1	
CONTACT #2	
EMAIL	
<input type="checkbox"/> GO GREEN!	DONOR 1: I wish to receive electronic notifications instead of paper statements and cut down on paper usage.
DONOR #2 (Primary recipient for all account communication)	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Other	
NAME (First, Last)/ ORGANIZATION	
NAME OF RESPONSIBLE PARTY	
MAILING ADDRESS	
CITY/ STATE/ ZIP	

**DONOR #2 (Primary recipient for all account communication)**☐ Mr. ☐ Mrs. ☐ Ms. ☐ Dr. ☐ Other

CONTACT #1

CONTACT #2

EMAIL

☐ GO GREEN!

DONOR 2: I wish to receive electronic notifications instead of paper statements and cut down on paper usage.

**NAME THE GIVING FUND**

Choose a name for your Giving Fund. You can name it after yourself, your family, or your cause (for example, “The Smith Family Philanthropy Fund” or “The Smith Family Foundation”). Grant letters to charities will include the account name and the name and address of the primary Donor(s), unless anonymity is requested.

GIVING FUND NAME

**FINANCIAL ADVISOR**

If you are currently working with a financial advisor, would you like to give him/her access to your account?

☐ YES☐ NO☐ (If NO, please move on the succession plan section)

ADVISOR NAME

FIRM NAME

MAILING ADDRESS

CITY/STATE/ZIP

DAYTIME PHONE

EMAIL

## FINANCIAL ADVISOR

### This individual has:

- ☐ Full Access (*authority to recommend grants and investment allocation, and receive statements*)
- ☐ Read-Only Access (*can see grants and account activity, and receive statements*)

### GO GREEN!

Sign your advisor up to receive email communications including statement notifications and cut down on paper usage.

- ☐ ADVISOR: I wish to receive electronic notifications instead of paper statements and cut down on paper usage.

## SUCCESSION PLAN

### DONORS HAVE THE OPTION OF:

1. Supporting one of SDG Impact Fund's permanent funds, used for: education, health, human services, and/or disaster relief initiatives worldwide.
2. Electing individuals to succeed them on the account with full rights as Donors,
3. Or, recommending charitable organizations to receive the remaining assets, as the beneficiary upon the death, incapacity or other disqualification of ALL Advisors of the account.

*Note: You may choose a combination of all three (total must equal 100%). If no option is selected, the succession plan will default to Option (1). A Donor can change this election at any time by notifying SDG Impact Fund, in writing*

- ☐ 1. I would like to name SDG Impact Fund as the beneficiary of the Giving Fund.

\_\_\_\_\_ % OF GIVING FUND VALUE

- ☐ 2. I would like to name the following individual(s) as beneficiaries of the Giving Fund.

*Please select one of the following options to determine how the account will be held by the successor(s):*

- ☐ Person(s) name below succeeds the account with full rights as Donor(s). OR,
- ☐ Persons named below split the remaining, undistributed assets establishing

SUCCESSOR #1	
NAME (First Middle Last)	
SOCIAL SECURITY NO.	
MAILING ADDRESS	
CITY/STATE/ZIP	
EMAIL	
DAYTIME PHONE	
SUCCESSOR #2	
NAME (First Middle Last)	
SOCIAL SECURITY NO.	
MAILING ADDRESS	
CITY/STATE/ZIP	
EMAIL	
DAYTIME PHONE	
<input type="checkbox"/> 3. I would like to name the following Charitable Organizations as beneficiaries of the Giving Fund. Consider the below-named organizations as recommended grant recipients upon the death or legal incapacity of all Donors. (Please list additional organizations and percentages on a separate page.)	
ORGANIZATION #1	
ORGANIZATION	
FEDERAL TAX ID	
PHONE	

MAILING ADDRESS	
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CITY/STATE/ZIP	
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<b>ORGANIZATION INFORMATION</b>
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ORGANIZATION	
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FEDERAL TAX ID	
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PHONE	
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MAILING ADDRESS	
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CITY/STATE/ZIP	
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<b>SIGNATURES</b>
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I acknowledge that I have read the Giving Fund Application Form and agree to the terms and/or conditions described therein. I understand that any contribution, once accepted by SDG Impact Fund, represents an irrevocable contribution and is not refundable to me. I hereby certify that, to the best of my knowledge, all information presented in connection with this form is accurate, and I will promptly notify SDG Impact Fund in writing of any changes. (Please attach any additional donor signatures.)

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DONOR 1 SIGNATURE	TITLE
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DONOR 1 PRINT NAME	DATE
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<hr/> DONOR 2 SIGNATURE	<hr/> TITLE
<hr/> DONOR 2 PRINT NAME	<hr/> DATE

**Mail Completed Agreement To:**  
 SDG Impact Fund  
 Attn: Tony Suber  
 475 E. Main Street #154  
 Cartersville, GA 30121  
  
**Or Fill Out and Sign Using DocuSign and Send to:** [admin@sdgimpactfund.org](mailto:admin@sdgimpactfund.org)

SDG Impact Fund, Inc | Tax ID# 46-2368538 is a public charity as described in the Internal Revenue Code Sections 501(c)(3), 509(a)(1), and 170(b)(1)(A)(vi). All money and property transferred to SDG Impact Fund, Inc. shall be an irrevocable gift to the charity. Donor Advised Funds Are Not FDIC Insured • Are Not Bank Guaranteed • May Lose Value. Always consult with your independent attorney, tax advisor, and investment manager for recommendations and before changing or implementing any financial, tax, or estate planning strategy.

## FEE SCHEDULE

SDG Impact Fund holds a distinct principle regarding our fee structure: it is considered a payment for impact and mission aligned services and will always remain entirely transparent and inclusive of all that the SDG Impact Fund is able to offer, for the life of our relationship.

SDG Impact Fund's Impact Administration Fee for all new accounts, and for all new assets received into an account is 5% (five percent).

The 5% Impact Administration Fee will be executed upon the creation of your account for all new assets donated. It will be executed ongoing for the life of your account up front, one time only when each new asset is donated into the account. There are no asset management fees or any other hidden or additional fees over time. Additionally, there are no fees on growth of assets held in your account. All growth of assets held in your account both short and long-term, remains entirely in your account, available to be granted/invested as you request.