

GIVING FUND APPLICATION

Please complete the following application to establish a Giving Fund (donor-advised fund) with National Christian Foundation (NCF). Then email, fax, or mail it to us. (See the bottom of this page for contact information, or visit our website's contact page.)

1. NAME AND TYPE

What would you like to name the Fund? _____

For Example: The Smith Family Giving Fund, The John 3:16 Fund, The Main Street Church Fund, etc. The Fund name and your name will appear on all Fund correspondence, as well as all correspondence that accompanies grants (distributions) from the Fund (unless you request anonymity).

FUND TYPE:

Circle One: Individual Family Ministry Church Company

If Fund is being established by a church, ministry, or company, list its name here.

2. ADVISOR CONTACT INFORMATION

Primary Advisor

Title	First Name	Initial	Last Name	Suffix
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Date of Birth	Social Security # / Tax ID #
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Address: Including P.O. Box, street address, suite or apt #

City	State	Zip
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Home Ph.	Business/Cell	Fax
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Email Address*

**This is required and will be your User ID on the Donor Website. E-Notifications will be sent here when quarterly statements are available.*

Preferred Method of Contact (Circle One)

Email Home Ph. Bus. Ph. Mail Cell

Additional Primary Advisor

Title	First Name	Initial	Last Name	Suffix
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Date of Birth	Social Security # / Tax ID #
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Address: Including P.O. Box, street address, suite or apt #

City	State	Zip
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Home Ph.	Business/Cell	Fax
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Email Address*

**This is required and will be your User ID on the Donor Website. E-Notifications will be sent here when quarterly statements are available.*

Preferred Method of Contact (Circle One)

Email Home Ph. Bus. Ph. Mail Cell

Unless instructed (by separate attachment), NCF will accept recommendations from either of the individuals named above. To add additional advisors, please provide the above information for each advisor on a separate sheet. If you wish to authorize additional advisors, please note their contact information (including email and address) on a separate sheet.

3. PROFESSIONAL ADVISOR INFORMATION (if applicable)

If you work with a professional advisor that you wish to have access to your Fund, please fill out the following section (attach an additional sheet if you have more than one professional advisor). If you do not wish for your professional advisor to have access, leave this section blank.

Type of Advisor: (Circle One) Accountant Attorney Financial Advisor Other (Specify)

Advisor Name & Firm Name

Mailing Address

City

State

Zip

Phone

Email

I authorize my advisor to recommend grants from the Fund: Yes No (if no box is checked, we will assume "No")

4. CONTRIBUTION INFORMATION

The suggested initial contribution to establish a Giving Fund is \$10,000. Please refer to NCF's Program Guidelines for information on the types of gifts NCF can accept.

Please check the type of contribution you will be making:

Check(s) in the amount of \$ _____
Check(s) should be made payable to "National Christian Foundation" ***Insert Fund Name in Memo on Check***

Wire in the amount of \$ _____
Please contact NCF for wiring instructions.

Assets to be gifted at a later time via testamentary gifting
Please contact NCF for more information or download "Testamentary Giving Option" from our website.

A nonliquid gift (as defined in Program Guidelines)
Please contact NCF for more information.

Publicly traded securities or mutual fund shares
Name of stock or mutual fund: _____

Number of shares: _____
To initiate transfer, visit website "Forms" section under Make a Gift or contact NCF for instructions.

5. INVESTMENT INFORMATION

Anticipated Fund Balance (Select One): Less than \$100,000 Greater than \$100,000

Your Giving Fund balance may be invested, dependent upon the size of your Fund, providing opportunity for financial growth. Please select one investment pool. You can select up to two pools if your Fund balance will be \$100,000 or greater. Percentages must total 100%.

____% Money Market: Lower risk, Money Market Fund Rates

____% Bond: Income Producing

____% Conservative: 40% Equities, 60% Bond Funds

____% Balanced: 50% Equities, 50% Long-Term and Short-Term Bonds & Money Market Funds

____% Growth: 60% U.S. Equities, 20% International Equities, 20% Intermediate Bonds & Money Market Funds

6. SUCCESSION PLAN INFORMATION

In the event of your death or incapacity, or the termination of your organization, you may wish to provide NCF with a "succession plan" for the Giving Fund you have established. There are four ways to divide the remaining assets in the Fund, and you may select any one of these, or a combination of some or all. Combinations must total 100% in the far right column.

- A. Name successor Advisors - You may wish to place some or all of the assets from your existing Fund into a new Fund(s) for others (such as your heirs) to distribute to charity. If you do not list percentages for your successors below, NCF will accept advice from one or all of the successor advisors on your current Fund.
- B. Distribute to ministry work - You may wish to recommend grants to your church or favorite ministries, granting out some or all of the assets in your Fund. This may also be granted over a period of time. Please attach specific instructions, if this is your recommendation.
- C. Distribute to NCF's ministry - You may wish to recommend a grant to support the ministry of National Christian Foundation as we seek to further the Gospel of Jesus Christ by educating, encouraging and equipping faithful stewards to give wisely.
- D. Create an NCF Legacy FundSM - You may wish to establish a Legacy Fund. If you desire greater accountability on the ministries chosen for funding or oversight for your successor advisors (Legacy Advisory Committee), a Legacy Fund may be for you. A Legacy Fund is an enhanced type of Giving Fund in which NCF assumes greater responsibility to ensure that your giving intent and granting desires are carried out faithfully after you are gone. Contact NCF for more information.

Name successors for your Fund

(A new Giving Fund will be created for each. If no percentages are entered, NCF will accept advice from one or all of the successor advisors.)

_____	<input type="text"/>	%
Successor Advisor A - Name, Address, City, State, Zip, Phone		
_____	<input type="text"/>	%
Successor Advisor B - Name, Address, City, State, Zip, Phone		

If you need to add additional names or organizations, please use a separate sheet of paper.

Distribute percentage to ministry work

_____	<input type="text"/>	%
Organization Name, Address, City, State, Zip, Phone		
_____	<input type="text"/>	%
Organization Name, Address, City, State, Zip, Phone		

If you need to add additional names or organizations, please use a separate sheet of paper.

Distribute percentage to the ministry of National Christian Foundation

	<input type="text"/>	%
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Create an NCF Legacy Fund

If you enter a percentage in the column on the right, an NCF staff member will contact you to explore this option.

	<input type="text"/>	%
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Must total 100% TOTAL: %

7. GENEROSITY CATALYST FUND INFORMATION

NCF operates a creative tool called the Generosity Catalyst Fund that we use to support ministries and projects involved in furthering the generosity message. When you set aside a portion of your Giving Fund for the Generosity Catalyst Fund, you'll be leveraging your giving to support the most cutting-edge projects and resources, including best-selling books, powerful videos, and worldwide generosity efforts. Learn more at nationalchristian.com/catalyst.

Please indicate the level of support you would like to provide to the Generosity Catalyst Fund. For more information, contact us.

I select the following amount to be distributed each June 1st from my Fund for the Generosity Catalyst Fund:
(Circle Your Choice or indicate % in the blank)

1.00 % .75 % .50 % .25% 0 % ____%

(Example: if your Fund's balance on June 1st is \$50,000, selecting .25% would distribute \$125 to the Generosity Catalyst Fund.)

8. HOW DID YOU HEAR ABOUT US?

Please tell us how you heard about NCF (please list specific names and/or organizations).

- Donor Referral: _____
- Ministry/church leader: _____
- Financial professional: _____
- Legal professional: _____
- NCF website/search engine: _____
- Web/Marketing: _____
- Event (e.g. Young Life, Generous Giving, The Gathering, etc.): _____
- Other: _____

Signatures

I acknowledge that I have read National Christian Foundation Program Guidelines and agree to the terms and/or conditions described therein. I understand that in order to qualify as a deductible contribution for income tax purposes, National Christian Foundation will fully own all contributed assets, and that earnings and losses on the investments in the various pools are typically allocated to the Giving Funds. Further, I understand that my communication regarding the Fund is advisory only and that ultimate decisions and control, relative to each of these issues, are that of National Christian Foundation.

Primary Advisor Signature (Required)

Date

Additional Primary Advisor Signature (Required)

Date

NATIONAL CHRISTIAN CHARITABLE FOUNDATION, INC. D/B/A NATIONAL CHRISTIAN FOUNDATION

By

Date

Name & Title

Effective Date