



FULLER DONOR-ADVISED FUND APPLICATION

Please complete the following application to establish a Fuller Donor-Advised Fund. You may email or mail the completed application. If you have any questions about completing this form, please contact Client Services at (626) 792-3232 or clientservices@thefullerfoundation.org.

Step 1: Name Your Fund

Choose a name for your fund. You may name it for yourself, for your family (i.e., John and Jane Doe Family Fund, Smith Family Fund), or in memory of someone. Grant acknowledgement letters sent to charities will reference this name, unless you choose to send grants anonymously.

_____ Fund

Step 2: Appoint Advisor(s)

The individual(s) establishing the fund is the donor and serves as Primary Advisor(s). The donor may appoint additional Advisors, allowing them the privilege of recommending grants. Attach additional sheets, if necessary.

Prefix: Mr. Mrs. Ms. Rev. Dr. _____

Name: _____ Suffix: _____

Social Security Number: _____ Date of Birth: ___ / ___ / ___

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Business/Cell Phone: _____

†Email: _____

Full Access to DonorView Website? †Yes No Read-Only

Account Statement Delivery Preference? Email Mail

Prefix: Mr. Mrs. Ms. Rev. Dr. _____

Name: _____ Suffix: _____

Social Security Number: _____ Date of Birth: ___ / ___ / ___

Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Business/Cell Phone: _____

†Email: _____

Full Access to DonorView Website? †Yes No Read-Only

Account Statement Delivery Preference? Email Mail

†Required if you would like access to the online DonorView website

Step 3: Designate Successor Advisor(s) or Charitable Beneficiary

You may designate individuals as Successor Advisor(s) to succeed you in advising on the fund upon the death of the surviving Advisor, or you may name one or more charities as the Charitable Beneficiary of the funds. If no Successor Advisor or Charitable Beneficiary is elected, The Fuller Foundation will award grants consistent with your last advised purpose. Attach additional sheets, if necessary.

Successor Advisor(s)

You may choose to retain assets in the fund, and Successor Advisors will equally share fund administration. If you choose to create separate funds and divide assets, please indicate the desired division of assets by percentage below.

Prefix: Mr. Mrs. Ms. Rev. Dr. _____

Name: _____ Suffix: _____

Social Security Number: _____ Date of Birth: ___ / ___ / ___

Address: _____

City: _____ State: _____ Zip: _____

†Email: _____ Primary Phone: _____

Full Access to DonorView Website? †Yes No Read-Only

Relationship to Primary Advisor: _____

Percent of Fuller Donor-Advised Fund: _____%

Prefix: Mr. Mrs. Ms. Rev. Dr. _____

Name: _____ Suffix: _____

Social Security Number: _____ Date of Birth: ___ / ___ / ___

Address: _____

City: _____ State: _____ Zip: _____

†Email: _____ Primary Phone: _____

Full Access to DonorView Website? †Yes No Read-Only

Relationship to Primary Advisor: _____

Percent of Fuller Donor-Advised Fund: _____%

Combined Total Must Equal: 100 %

Charitable Beneficiary

You may designate a specific percentage each charity should receive of the remaining balance. If no percentages are entered, The Fuller Foundation will disburse funds evenly among the listed charities.

Organization Name: _____

Address: _____

City: _____ State: _____ Zip: _____

EIN: _____ Website: _____

Percent of Fuller Donor-Advised Fund: _____%

Step 4: Recommend an Investment Option

Recommend how to allocate your contributions by choosing among the available options. If you would like more detailed descriptions of these investment options, please contact Client Services. The combined total must equal 100%.

Percent of
Total:

1. Fuller Conservative Pool

Aims for long-term capital preservation and limited asset growth, through a passively managed allocation of 25-40% equities and 60-75% fixed income.

_____ %

2. Fuller Balanced Pool

Aims for a mix of capital preservation, current income, and asset growth, through an allocation of 55-65% equities and 35-45% fixed income.

_____ %

3. Fuller Growth Pool

Aims for asset growth through an allocation of 80-95% equities and 5-20% fixed income.

_____ %

4. Fuller Endowment Pool

Aims to provide donors with long-term returns and limited volatility, through an allocation of 50-60% equities, 5-20% fixed income, and 20-35% alternatives.

_____ %

5. Fuller Socially Responsible Pool

Aims for equity investments with social impact. Consists of 100% socially screened equities.

_____ %

Combined Total Must Equal: 100 %

Step 5: Make an Initial Contribution

Please refer to The Fuller Foundation Donor-Advised Funds Guide for information on the types of gifts which can be accepted.

The minimum initial contribution of \$5,000 should be made at the time your Fuller Donor-Advised Fund agreement is signed. Complete the applicable section below and check the appropriate box.

Check in the amount of \$ _____
Check(s) should be made payable to "The Fuller Foundation".
Include the name of your Fuller Donor-Advised Fund in the memo on check.

Wire in the amount of \$ _____
Please contact Client Services for cash wiring instructions.

Marketable securities or mutual fund shares:
Name of security or mutual fund: _____
Number of shares: _____
Please contact Client Services for share transfer instructions.

Complex assets (e.g., real estate, restricted stock, partnership interests, excluding marketable securities, and life insurance)

Assets gifted at a later time (at death or deferred)
Please contact Client Services for additional information.

Other: _____

Statement Distribution

For Advisors with online access to the DonorView Website, account statements will be available for download on a monthly basis. If alternate statement preferences are preferred, please contact Client Services.

Step 6: Review and Sign Acknowledgement

I (we) acknowledge that I (we) have read The Fuller Foundation's Donor-Advised Funds Guide and agree to the terms and conditions described therein. I (we) understand that in order for my (our) contribution(s) to qualify as an income tax deduction, my (our) gift is irrevocable, and the ownership and custody of my (our) donated property will be fully relinquished to The Fuller Foundation, that my (our) communication regarding my (our) Fuller Donor-Advised Fund is advisory only and ultimate decision and control relative to each of these issues, are the responsibility of The Fuller Foundation.

Primary Advisor's Name

Primary Advisor's Signature

Date

Additional Advisor's Name

Additional Advisor's Signature

Date

9/2018