



AGENCY ENDOWMENT AGREEMENT FORM

**You have the privilege of naming your endowment fund.
You may name your fund for an individual, parish, school or a specific charitable purpose.
(e.g. John Smith Memorial Endowment Fund; St. Jerome Parish Endowment; Seton Catholic
Preparatory Endowment Fund, etc.)**

Please name your fund

As a donor you have full and equal rights to establish a designated fund or permanent endowment to provide for the support of charitable activities.

Donor 1 Information

Mr. Mrs. Ms. Dr. Reverend Sister Other _____

First Name: _____ Middle Initial: _____ Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Bus Phone: _____

Fax: _____ Email: _____

Donor 2 Information

Mr. Mrs. Ms. Dr. Other _____

First Name: _____ Middle Initial: _____ Last Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Bus Phone: _____

Fax: _____ Email: _____

NOTE: If there are more than 2 initial donors, please attach a separate sheet with the same information for each donor.

May we share your story so that others may know the benefits of leaving a legacy? Yes No

Your Initial Contribution

IMPORTANT: Please contact our office prior to sending and money or transferring securities.

Check Amount \$: _____

Securities # of Shares: _____ Company Name: _____ Approx. Value \$ _____

Mutual Funds # of Shares: _____ Company Name: _____ Approx. Value \$ _____

Other Description: _____

Instructions for Stock Transfer

If transferring securities or mutual funds through a broker, please give the following account information to your broker. Funds or securities should be transferred to:

Wedbush Morgan, Inc.

Broker: Mike Sherman 480.778.8540

Account: 8945-9347 DTC #0103

Investment Recommendation

You may select the balance of securities and fixed income for your fund's investment profile. Please choose from the following options, or you may defer this decision to the Catholic Community Foundation's Investment Committee.

Equities / Fixed

- 80% / 20%*
- 50% / 50%
- 0% / 100% Money Market

*Recommended by the Foundation's Investment Committee

Signature

I hereby irrevocably give the property described in this application and its attachments to the Catholic Community Foundation to establish a donor advised fund.

I intend that this fund be operated exclusively for charitable purposes, and that it be treated as a component fund of the Foundation.

I understand that the Foundation's Board of Directors is empowered to modify any restriction related to the fund if in its judgment such a restriction becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with charitable needs. I acknowledge that I have read and agree to the Endowment Fund Terms and Conditions. I understand that the Foundation's Board of Directors reserves the right to modify the endowment program and the Terms and Conditions as it deems necessary.

I hereby certify that to the best of my knowledge all of the information presented in connection with this application is accurate and I will notify the Foundation promptly of any changes.

Donor's Signature

Date

Donor's Signature

Date