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Application to Begin a Donor Advised Fund

By completing and signing this application you certify that you will conduct activities that satisfy the requirements of the Internal Revenue Code. You further certify that you will abide by the policies and conditions set forth by the National Heritage Foundation, Inc. and its Board of Directors as amended from time to time in the sole discretion of the Board of Directors. If these guidelines are not followed, NHF reserves the right to sever our relationship and terminate your foundation. In order to qualify as a deductible contribution for income tax purposes, the ownership, custody, and control of any donated funds and property must be fully relinquished to the National Heritage Foundation. Any disbursements requested must be approved by the Board of Directors in the sole discretion of the Board, and decision of the Board is final. Please include a telephone number where you can be reached if we have any questions. Mail this completed application and payment to the address listed above. Once your application has been reviewed and approved by our Board of Directors, you will receive a framed parchment certificate with your foundation name and a manual entitled, "Now That You Have Your Foundation." Please allow 4-6 weeks for delivery.

PLEASE PRINT CLEARLY:

Proposed Foundation Name: _____

Founder/Director Name: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Social Security Number: _____

Telephone - Residence: (____) _____ **Business:** (____) _____

Cell Phone: (____) _____ **Fax:** (____) _____ **Email:** _____

Signature: _____ **Date:** ____ / ____ / ____

Your Foundation may choose a helper. This person must be a member of NACEC (pronounced Nay-Check). If you do not know someone at this time, you may leave this field blank or simply write "Home Office."

Philanthropic Development Officer (PDO, PDO-RF) (if applicable): _____

Company Name, Address: _____

City / State / Zip: _____

Work Phone: (____) _____ **Email Address:** _____

Signature: _____ **Date:** ____ / ____ / ____

-See Reverse-

Proposed Charitable Purpose:

NHF/DAF disbursements are restricted to gifts to charities and charitable activities in the USA and overseas as approved by NHF. We at NHF need to understand your vision of the purposes of your foundation in order to both make sure we can support you in this vision and that you have a commitment to and clear direction for your foundation. Please describe below, in your own words, why you wish to create a foundation at NHF, your vision for the religious, educational, scientific, and/or charitable outreach and service of your foundation, and why you believe your foundation will make this world a better place and serve humanity. Feel free to attach additional pages. This is the purpose that will become your mission statement.

“I acknowledge that I have been afforded ample opportunity to consult with an attorney, certified public accountant, and/or other independent professional advisors of my choosing in connection with my decision to create a foundation at NHF. I affirm that I have made the decision to apply to create a foundation at NHF in order to advance the religious, educational, and/or charitable purposes explained by me above. If and to the extent that I may derive any tax benefit from my charitable contribution to NHF, such benefit is incidental to my desire to serve the purposes set forth above. I have made the decision freely and voluntarily to apply to create the foundation after giving it careful consideration and deliberation and with full awareness of how foundations are administered by NHF in accordance with federal tax laws which pertain to publicly supported charities, such as NHF. I understand that contributions to NHF are absolute, irrevocable and unconditional charitable contributions and I have no right to the return of them. Nor do I have any right or entitlement to any income from the funds or property I have contributed to NHF as an absolute, irrevocable, and unconditional charitable contribution. I realize that the funds or property which I shall donate to NHF become the sole and exclusive property of NHF.”

I have read and understand the New Foundation Legal Note on your website at www.nhf.org under the tab “Financial & Legal” and agree to comply with it. Signature of the Founder/Director:

Signed: _____ Printed: _____ Date: ____ / ____ / ____

I have enclosed a check for at least \$385 to begin my foundation. (Application fee of \$285 plus an initial donation of at least \$100 to my Foundation)

Please charge \$ _____ (at least \$385) *(We do not accept American Express)*
Credit Card #: _____ Exp. Date: ____ / ____

Signature: _____