



## Corporate Fund Agreement

12977 North Forty Drive, Suite 368, St. Louis, MO 63141 (fax) 636-634-3411

Complete this form to establish a Corporate Donor Advised Fund (Fund) with your irrevocable gift to YouthBridge Community Foundation (YouthBridge). For questions, please call 314-985-6778 or email us at [info@youthbridge.org](mailto:info@youthbridge.org).

### CORPORATE INFORMATION

Company Name \_\_\_\_\_

Website \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

### PRIMARY AUTHORIZED CONTACT – This person should be contacted first for anything concerning the Fund

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_

Title \_\_\_\_\_ Direct Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_

### CONTRIBUTION

In accordance with IRS regulations, donors may not impose restrictions or conditions on contributions to a Donor Advised Fund.

Standard contributions can be made by check or wire transfer. Check  Wire transfer  Other

*To transfer publicly traded securities, real property, personal property, closely held stock, other assets or complete a wire transfer of funds, please contact us at 314-985-6778 or [info@youthbridge.org](mailto:info@youthbridge.org). All contributions are subject to the Gift Acceptance Policy of YouthBridge.*

Amount of Contribution (or estimated value): \_\_\_\_\_ Date of Contribution: \_\_\_\_\_

### Please Mail Checks to:

YouthBridge Community Foundation  
12977 North Forty Drive, Suite 368  
St. Louis, MO 63141

# 1. NAMING YOUR FUND

Please name your Fund. Examples are Smith Corporation Charitable Fund, The Smith Company Foundation, etc.

Fund Name: \_\_\_\_\_

# 2. INVESTMENT MANAGEMENT (Complete the Investment Recommendation Form)

A donor establishing a Fund may request a segregated account and recommend a financial advisor to work with the YouthBridge Financial Advisor Program. As a participant in the Financial Advisor Program, the selected financial advisor will be responsible for the management of the assets of the designated Fund, and comply with the policies and standards of YouthBridge. In accordance with IRS regulations, YouthBridge has the final authority regarding investments and the selection of financial advisors. The donors, Gift Advisors or affiliated persons/organizations may not serve as the Fund's investment advisor.

Alternatively, donors may choose to invest in the YouthBridge Investment Pools. Assets of Donor Advised Funds are normally commingled with the investment assets of other funds for investment purposes. YouthBridge offers a variety of pooled investment funds permitting the donor to select one pre-set asset allocation strategy or to create a customized asset allocation strategy. These investment pools are all managed by professional money managers and monitored by an investment committee. More detailed information about each investment pool is available as a separate exhibit.

- I am recommending an investment advisor to manage my Fund as stated in the attached Investment Recommendation Form. Initial here if you want the investment advisor identified on the Investment Recommendation Form to serve as a Gift Advisor and have authority to submit grant recommendations. This authority remains in effect until revoked in writing.
- My Fund will be invested in the YouthBridge Investment Pools as selected in the attached Investment Recommendation Form.

**NOTE:** All donors must complete the Investment Recommendation Form.

# 3. GIFT ADVISOR(S)

## GIFT ADVISOR INFORMATION

Corporate donors may nominate Gift Advisors to recommend grants from the Fund and may nominate replacement Gift Advisors at any time. In accordance with IRS regulations, YouthBridge has the final authority on how grants are made from a Fund.

- Each Gift Advisor is authorized to recommend gifts independently.
- All Gift Advisors must act jointly in recommending gifts. (Gift Advisors will not have access to online grant making.)

\_\_\_\_\_  
**Gift Advisor - Name (Prefix, First, Middle Initial, Last)**

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Relationship to Donor

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
**Gift Advisor - Name (Prefix, First, Middle Initial, Last)**

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Relationship to Donor

\_\_\_\_\_  
Email Address

## 4. REMAINDER BENEFICIARY

In the event of death, incapacity or resignation of all Gift Advisors, and provided that the corporate donor has not nominated to replace any Gift Advisor, the balance of the Fund shall be used as follows:

**OPTION 1** - Transferred to YouthBridge to support its mission and work in the community.

**OPTION 2** - Distributed to the following IRC section 501(c)(3) public charities in the percentages shown:

\_\_\_\_\_ % to YouthBridge Community Foundation

\_\_\_\_\_ % to (Insert charity name here) \_\_\_\_\_

\_\_\_\_\_ % to (Insert charity name here) \_\_\_\_\_

\_\_\_\_\_ % Total must equal 100 percent

**OPTION 3** - YouthBridge will continue to hold and administer the Fund as a Named Fund distributing grants consistent with the intent and history of the Fund subject to policies of YouthBridge.

## 5. ADDITIONAL INSTRUCTIONS

Please include any additional instructions to help us understand the charitable intent for your Fund.

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## 6. ELIGIBLE GRANTEES

Distributions from the Fund may be made only to organizations which are qualified under section 501(c)(3) of the Internal Revenue Code (the "Code") and classified as a public charity under sections 509(a)(1) or 509(a)(2) of the Code, or a private operating foundation under section 4942(j)(3) of the Code.

Distributions from the Fund may not be made to pay dues for membership in an organization, purchase admission to charitable events, discharge or satisfy a legally enforceable obligation or pledge, or to support political or legislative activities.

Although not required, we encourage at least 50% of your grants be made to agencies that serve children and youth.

### Voluntary Support for Community Programs

YouthBridge provides community programs that support children, promotes philanthropy and helps nonprofit organizations become more sustainable. Please consider supporting our work in the community by checking one of the following boxes:

I/We agree to contribute 2% of my Fund value annually to support the work of YouthBridge. (pro-rated monthly)

I/We agree to contribute 1% of my Fund value annually to support the work of YouthBridge. (pro-rated monthly)

I/We agree to contribute \_\_\_\_% (whole numbers only) of my Fund value annually to support the work of YouthBridge. (pro-rated monthly)

At this time, I do not choose to support the work of YouthBridge with a contribution from my Fund.

## 7. DORMANT FUNDS, MINIMUMS, FEES, & DONOR RECOGNITION

If a Fund is dormant for three years, YouthBridge will make a good faith effort to contact the Gift Advisor(s) to encourage him or her to recommend a gift. If YouthBridge is unable to establish contact with the Gift Advisor(s), YouthBridge will use the Fund balance at its own discretion.

The undersigned hereby acknowledges receipt and agrees to the terms in the Donor Advised Fund Guidelines including the administrative fee schedule. The undersigned further understands the fee schedule is subject to modification and may be increased or decreased at the discretion of YouthBridge Community Foundation. The minimum annual administration fee is \$250. The undersigned agrees to be bound by the most current schedule of fees published by YouthBridge.

The Gift Advisor(s) may at any time recommend that the Fund be terminated and any remaining Fund assets be granted to one or more public charities. The undersigned understands that YouthBridge and its duly authorized committees, reserve the right to make the final decision regarding distributions from the Fund.

- YouthBridge may disclose our Fund's name in its publications.
- YouthBridge may not disclose our Fund's name in its publications.

You will retain the option of making grants anonymously from your fund regardless of your decision to disclose or not disclose your fund's name in YouthBridge publications.

## 8. PROFESSIONAL ADVISOR INFORMATION

If a professional advisor guided you in the decision to establish the Fund, please fill out the following section.

\_\_\_\_\_  
Professional Advisor Name

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Phone

## 9. VARIANCE POWER & SIGNATURES

YouthBridge honors a donor's charitable intent through a donor-advised fund. In rare circumstances, YouthBridge may determine that the donor's charitable purposes have become unnecessary, obsolete, incapable of fulfillment, impractical or inconsistent with the community's charitable needs. In that case and in accordance with applicable regulations, YouthBridge may exercise its variance power to change the charitable purpose of the fund. In doing so, the YouthBridge will strive to make distributions that are consistent with the donor's charitable interests.

\_\_\_\_\_  
**Name of Corporate Donor**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature of Authorized Officer**

\_\_\_\_\_  
Printed Name, Title

\_\_\_\_\_  
**Accepted by:**

YouthBridge Community Foundation

\_\_\_\_\_  
**Date**