



101-334 Donlands Ave. Toronto, ON M4J 3R9
 1-800-387-8146 Fax: 416-465-6367
www.linkcharity.ca info@linkcharity.ca

DONOR ACCOUNT APPLICATION

Application Type (Select One):

<p>_____ Basic Donor Account (Short-term holdings) Complete Sections "A", "B" and "F" only</p>	<p>_____ Donor Advised Fund (Long-term holdings) Complete ALL sections</p>
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Section A: Primary Donor(s) – Gifts and receipts will be issued in the name(s) listed

Applicant:

Family Name		Given Name	
Address			
City	Province	Postal Code	
Phone	Fax	E-mail	

Co-Applicant:

Family Name		Given Name	
Relationship		Contact information same as above <input type="checkbox"/>	
Address			
City	Province	Postal Code	
Phone	Fax	E-mail	

Section B: Funding Details

Targeted gift size: \$ _____

How will the gift be funded?

<p>_____ Appreciated Securities (Please enclose copy of transfer form and letter of direction)</p>	<p>_____ Cash (Please enclose cheque and letter of direction)</p>
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Section C: Investment Options

<input type="checkbox"/> 2% Fixed Interest	<input type="checkbox"/> Investment Pool (some volatility)	<input type="checkbox"/> Zero Income
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Section D: Gifting Authority/Alternate Gift Officers

Will anyone other than the contract owner(s) have authority to make gifts from the Donor Advised Fund?

Y N

If so, who and under what conditions: _____

Relationship: _____

Section E: Final Gift Distributions

After the death of the primary donors, the remaining balance of the Donor Advised Fund (if any) should be distributed in the following way:

<input type="checkbox"/> According to the wishes of the Alternate Gift Officer(s)	<input type="checkbox"/> The Donor Advised Fund will be converted to a self-terminating endowment (Link Charity will contact you for more information)
<input type="checkbox"/> To the charities listed in the enclosed letter (Please attach instructions)	<input type="checkbox"/> Other:
<input type="checkbox"/> Proportionately to all the charitable beneficiaries during the previous 36 months	

Section F: Signatures

The applicant(s) hereby apply for this Donor Account / Donor Advised Fund under the terms and conditions at the time the money is made available.

Applicant

Co-Applicant

Date: