

Bradley Impact Fund - Personal Giving Account Application

Donor Information and Next Steps

This application can be found online. Please refer to the previous pages of this Personal Giving Account Program Description or contact the Bradley Impact Fund if you have any questions about this application.

After you complete this application, a Bradley Impact Fund representative will arrange an in-person meeting with you. At this time, we will discuss and finalize your donor intent, share our investment offerings, and establish your successors and/or succession plan. We look forward to working with you.

Donor/Advisor #1		
Mr./Mrs./Ms./Dr.:		
Name:		
Relation to Donor/Advisor #2:		
Date of Birth:		
<i>Mailing Address</i>		
Street:		
City:	State:	Zip:
<input type="checkbox"/> Use this primary mailing address for all mailed correspondence.		
Business Phone:		
Home Phone:		
Email:		
<input type="checkbox"/> Use this email address for all email correspondence.		

Donor/Advisor #2		
Mr./Mrs./Ms./Dr.:		
Name:		
Relation to Donor/Advisor #1:		
Date of Birth:		
<i>Mailing Address</i>		
Street:		
City:	State:	Zip:
<input type="checkbox"/> Use this primary mailing address for all mailed correspondence.		
Business Phone:		
Home Phone:		
Email:		
<input type="checkbox"/> Use this email address for all email correspondence.		

How Would You Like to be Addressed?

(e.g. Mr. and Mrs. Joseph E. Smith; Jill and Joseph Smith, etc. This is the name we will provide to charities that receive grants from your Personal Giving Account, unless you request anonymity.)

Name of Personal Giving Account

(e.g. Smith Family Charitable Fund. This name will appear on each grant letter and check, unless you request it be withheld.)

Initial Contribution

(Please describe the assets comprising the initial contribution to establish the Account, including approximate value.) \$5,000 minimum value required.

I have read the Bradley Impact Fund Personal Giving Account Program Description, and agree to its terms and conditions. I understand that grants from this Account may not be used to satisfy pledges. I understand that the Bradley Impact Fund Board of Directors reserves the right to modify the Personal Giving Account Program, as it deems necessary.

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

Donor's Signature

Date

Donor's Signature

Date