

Donor-Advised Account Application

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Donor-Advisor Information

All Donor-Advisors named on the Donor-Advised Account have **full and equal privileges** to recommend grants, recommend changes to pool allocations, name successors to the account, and recommend additional donor-advisors with the same privileges. If there is more than one mailing address, all account correspondence will be sent to the Primary Donor-Advisor. There can be up to four Donor-Advisors. Please attach additional sheets if necessary.

a) Primary Donor-Advisor

Name

Date of Birth (required)

Social Security Number (required)

Street Address (PO Boxes not acceptable)

City

State

Zip Code

() _____ () _____
Daytime Phone Evening Phone

E-Mail Address

b) Secondary Donor-Advisor

Name

Date of Birth (required)

Social Security Number (required)

Street Address (PO Boxes not acceptable)

City

State

Zip Code

() _____ () _____
Daytime Phone Evening Phone

E-Mail Address

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Investment Pool Selection

You may recommend how to allocate your initial contribution to one or a combination of the four pools. If you do not make a recommendation, your contributions will be allocated to the Short Term Reserves Pool. Please review pool descriptions in the Program Circular before making your recommendation. The total must equal 100%.

Stock Investment Pool _____% Bond Investment Pool _____% Balanced Investment Pool _____% Short Term Reserves Pool _____%

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Name the Account

Please indicate below what you would like to name the account (e.g. Smith Family Donor-Advised Account). Grants made are accompanied by a letter that will include the name of the account, unless anonymity is specifically requested.

Account Name

Johnson Charitable Gift Fund

3777 West Fork Road
Cincinnati, Ohio 45247
513-661-3100 • 800-541-0170
513-661-3160 (FAX)
www.johnsoninv.com

The Johnson Charitable Gift Fund is a public charity. Johnson Investment Counsel, Inc. provides investment management and administrative services to the Gift Fund.



Donor-Advised Account Application (cont'd)

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Recommending Successor Donor-Advisor(s) OR A Charity as Beneficiary

Donors may name individuals or an organization to succeed them on their donor-advised account, with full privileges as donor-advisors (such as overseeing contributions and making grant recommendations). If donors do not wish to name individual successor(s), they have the option of recommending one or more IRS-qualified U.S. public charities as beneficiaries of the balance of the Donor-Advised Account, to be distributed upon the death of all Donor-Advisors. Naming charities as beneficiaries will terminate all successor donor-advisors. Refer to the Program Circular for more details. There can be more than two successor donor-advisors or more than two charitable organizations as beneficiaries. Please attach additional sheets if necessary. If the Donor-Advisor does not name a successor donor-advisor or recommend a charitable organization as beneficiary, upon notification of the death of the last remaining donor-advisor, the Directors will redeem the remaining units in the Donor-Advised Account and distribute the proceeds to the Gift Fund's Unrestricted Endowment Account. These selections may be changed at anytime by contacting the Gift Fund

a) Selecting Successor Donor-Advisor(s) Successor Donor-Advisor 1

Name		Date of Birth (required)	Social Security Number (required)	
Street Address (PO Boxes not acceptable)		City	State	Zip Code
()	()	E-Mail Address		% Percentage of Account
Daytime Phone	Evening Phone			

Successor Donor-Advisor 2

Name		Date of Birth (required)	Social Security Number (required)	
Street Address (PO Boxes not acceptable)		City	State	Zip Code
()	()	E-Mail Address		% Percentage of Account
Daytime Phone	Evening Phone			

OR

b) Recommending a Charity as Beneficiary Charity as Beneficiary 1

Name of Charitable Organization		Federal Tax ID Number (required)		
Street Address (PO Boxes not acceptable)		City	State	Zip Code
()	Contact Person	Percentage of Account		%
Daytime Phone				

Charity as Beneficiary 2

Name of Charitable Organization		Federal Tax ID Number (required)		
Street Address (PO Boxes not acceptable)		City	State	Zip Code
()	Contact Person	Percentage of Account		%
Daytime Phone				

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Signature

I/We acknowledge that I/we have read the Program Circular and agree to the terms and/or conditions described therein. I/We understand that any contribution, once accepted by the Directors, represents an irrevocable contribution to the Gift Fund and is not refundable to me/us. I/We hereby certify that, to the best of my/our knowledge, all information presented in connection with this application is accurate, and I/we will promptly notify the Gift Fund in writing of any changes. (Please attach any additional donor signatures.)

Primary Donor Signature

Date

Secondary Donor Signature

Date

Important Information About Procedures for Establishing a Donor-Advised Account

Under policies of the Johnson Charitable Gift Fund, and in accordance with the U.S. Federal anti-money laundering regulations applicable to the various financial institutions that provide financial services to the Johnson Charitable Gift Fund, we obtain, record, and may verify information that identifies each person who establishes a Donor-Advised Account at the Gift Fund and other people who contribute or are successors to the Donor-Advised Account.

What this means for you: When you open a Donor-Advised Account, we will ask for the name, address, date of birth, and other information that will allow us to identify people with access to the Donor-Advised Account. We may also ask to see individual's driver's licenses or other identifying documents, and we may verify the information we obtain.

The Johnson Charitable Gift Fund values your privacy and will not disclose your personal information unless required by law, necessary to provide services for your account, or directed by you. If you would like a complete copy of the Privacy Policy, please contact the Gift Fund.

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