

Any donor. Any gift. Any charity.

Use the following information and instructions for opening a Donor-Advised Fund (DAF) investment account

As the ONLY owner of the investment account, any references within the investment account application/paperwork to the owner should be completed to reflect Renaissance Charitable Foundation's (RCF) information, not that of the donor. The Financial Advisor of record should also review and sign the Investment Policy Statement and send to RCF with the completed DAF application.

Clearly indicate on the investment account application each section that requires officer information, and each signature line where the RCF officers must sign or initial. The officers of RCF will sign the investment account application and each will have individual authority to transact business in the investment account. Once the paperwork has been completed, it can be sent directly to RCF officers via e-signature (preferred) OR directly to the RCF team at NM@reninc.com. If using e-signature, please send directly to Greg Baker (gregbaker@rcgf.org) and Alyssa Rysdyk (alyssarysdyk@rcgf.org) for completion. Please note, only two officers are required to sign. The officers of RCF are authorized to act independently – only one officer needs to sign the application.

► RCF information

Account Title	Renaissance Charitable Foundation Inc. ATTN *DAF Account Name*. For example: Renaissance Charitable Foundation Inc. ATTN: Juan & Maria Smith Charitable Gift Fund		
Address	8888 Keystone Crossing, Suite 1222, Indianapolis, IN 46240		
Contact and Requests	855-630-3439 or NM@reninc.com		
NAICS Industry Code	813211		
Delivery Preferences	Email for investment account statements ONLY to RCFSTMT@reninc.com		
Federal Tax ID Number	35-2129262		
IRS W-9 Exempt Payee Code	ONE		
IRS W-9 Exempt FATCA Code	A		
Account Type	Select the option on the account application that best applies to RCF’s status as a non-profit entity and C-corporation.		
Beneficial Owners	As a charity, there are NO beneficial owners		
Control Person	Gregory W. Baker		
Annual Income	\$1M+		
Net Worth	\$3B+		
	Mutual Funds:	\$1.5B	50%
	Stocks:	\$1B	30%
	Alternatives:	\$300M	10%
	Bonds:	\$150M	5%
	Cash:	\$150M	5%
	RCF is a Qualified Investor; Qualified Purchaser; Accredited Investor; and Active Non-Financial Entity. RCF is also an Institutional Investor because it owns more than \$50 million in assets.		

Any donor. Any gift. Any charity.

Time Horizon and Liquidity Needs	Account Time Horizon: 5-10 years Annual Expenses: 5% Special Expenses Time Frame: 5+ years
Source of Income	Gifts/sale of existing assets
Federal Income Tax Bracket	0%
Investment Experience	20+ years (all investment types)
Investment Knowledge	(1- None through 4- Extensive) Extensive knowledge of: Stocks: 4, Bonds: 4, Insurance/ Annuities: 4, Mutual Funds: 4, REITs/DDPs/LPs: 4, and Real Estate: 4. Frequent knowledge of Options: 3 and Commodities: 3
Trusted Contact	Because RCF is a nonprofit corporation with multiple officers listed on each account, a Trusted Contact is not necessary.
Margin Trading	Not permitted, per RCF policy.

► RCF receiving account information for standing payment instructions

This is not to be used to send contributions – all contributions should be directed into the associated investment account.

Account Title	Renaissance Charitable Foundation Inc.
Account Type	Checking
Account Number	4944001874
Routing Number	121000248 (this is used for ACH and Wires)
Account Signers for Renaissance	Gregory W. Baker and Alyssa J. Rysdyk
Bank Address	Wells Fargo Bank, N.A. D1127-023, PO Box 563974 Charlotte, NC 28256