Renaissance Charitable

Any donor. Any gift. Any charity.

Thank you for choosing the Northwestern Mutual Donor-Advised Fund (DAF) sponsored by Renaissance Charitable Foundation (RCF)! As a trusted advisor, you empower clients to make a meaningful impact through charitable giving. RCF offers unparalleled flexibility and expertise, enhancing your services and supporting your clients' philanthropic goals.

We are excited to bring you an enhanced new account opening process to open your client's philanthropic account with RCF within a day!

Account Opening Instructions – Follow the below steps to get started!

1. Open the Pershing investment account, owned by Renaissance Charitable Foundation.
    a. Navigate to the Mutual Knowledge internal site and search for *Renaissance Charitable Foundation (RCF) – Account Opening* to obtain the necessary information to open the NMIS/WMC DAF account.
2. Begin the DAF application through the donor portal: https://NorthwesternMutual.DonorFirstX.com
    a. Please note, the online application will require you to enter the primary financial advisor's CRD number.
    b. A step-by-step guide of the online application can be found on the next page!
3. Fund the investment account or transfer an existing DAF. To confirm the contribution, email proof of the transaction to Renaissance Charitable via a screenshot of the account that includes the following:
    a. Investment Account Number
    b. Date and detail of the initial contribution activity (activity line showing date, types, amount/# of shares, etc.)

How to transfer an existing DAF account:

You can easily transfer funds from another DAF to RCF in three simple steps:

1. Once the application is complete and investment account is opened, enter an Account Closing Grant request from the existing DAF provider.
2. Please enter the Account Closing grant with the following details:
    - Nonprofit Name: Renaissance Charitable Foundation Inc.
    - EIN/Tax ID: 35-2129262
    - Address: 8888 Keystone Crossing, Suite 1222, Indianapolis, IN 46240
    - Purpose/Designation: **Name of DAF with RCF and investment account number**
3. RCF will confirm receipt of funds and complete the account setup.

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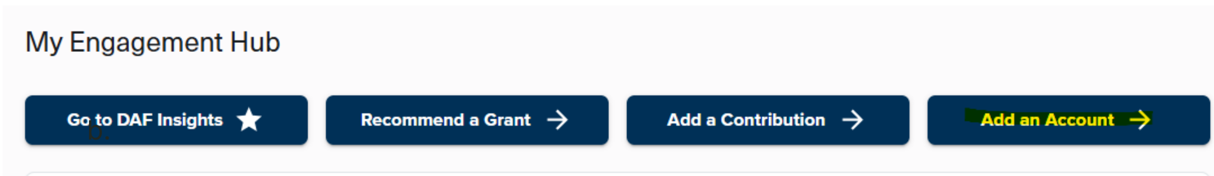
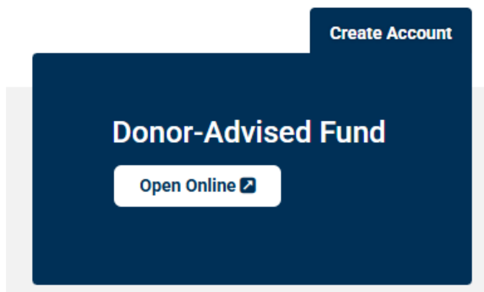
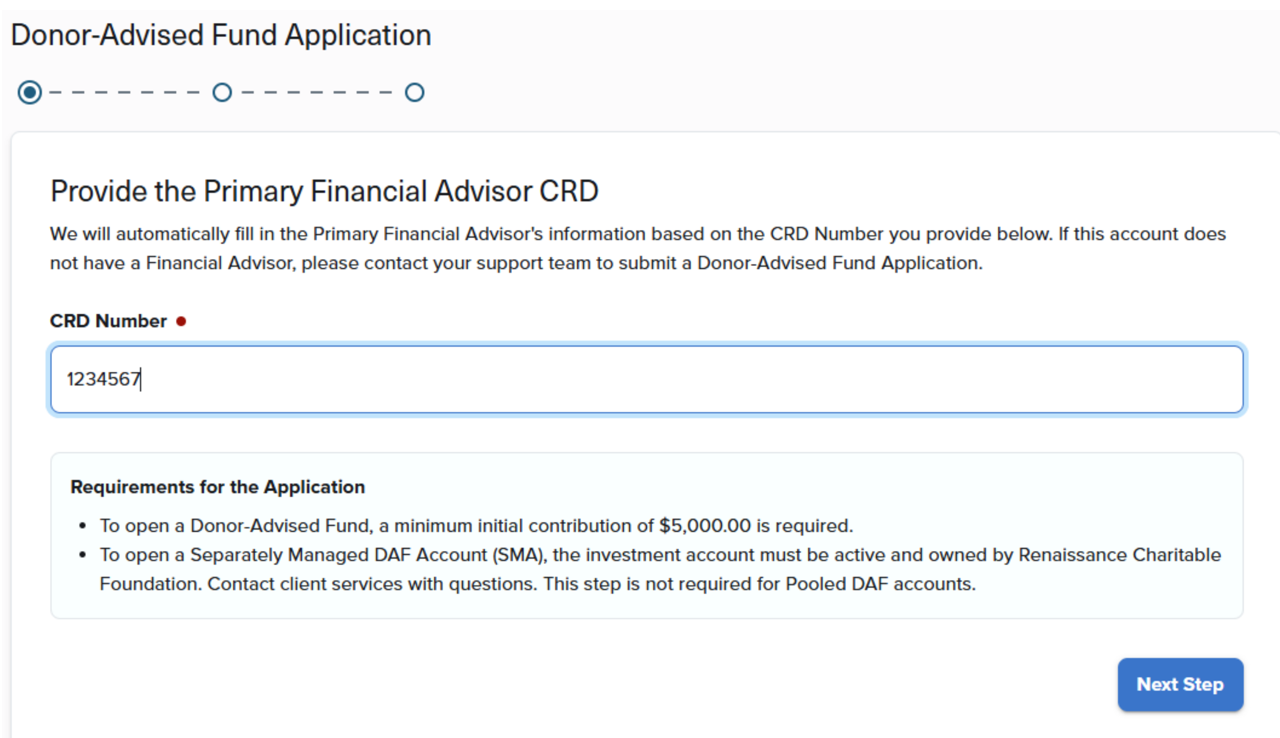
Online Application Entry – net new DAF

1. Navigate to https://NorthwesternMutual.DonorFirstX.com and select “Create Account” from the upper right-hand corner then select “Open Online”
    a. **If you already have credentials for the donor portal above, please LOG IN and select “Add an Account” at the top of the page.





2. Enter the primary financial advisor’s CRD Number and select Next Step.



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3. Based on the CRD record, the primary financial advisor’s information will pre-populate. Please confirm the details.

Donor-Advised Fund Application

Primary Financial Advisor

We have prefilled the Primary Financial Advisor's information based on the CRD number you provided. Please make sure all of the information is complete and correct. If any information is missing or incorrect, please update it below.

CRD Number: [redacted]

First Name •
Example: John, Mary, etc.
Chelsea

Last Name •
Example: Doe, Garcia, etc.
Dardy

Office Phone Number •
Example: (123) 456-7890
(123) 456-7890

Email Address •
Example: email@email.com
bestadvisor@nm.com

Address Line 1 •
Enter street address or PO Box
8888 Keystone Crossing

Address Line 2
Suite 1200

City •
Indianapolis

State / Province •
Indiana

Postal Code •
46240

4. Select Pershing as Custodian from the Custodial Account Firm Picklist and enter the Custodial Account Number.
    a. *If you have not opened the Pershing investment account, please check the box confirming the investment account is not yet established.

Custodial Account Firm (SMA Only)
Select the financial institution that holds the custodial account
Pershing as Custodian

Custodial Account Number (SMA Only)
Enter the account number where the investment assets are held
12C56789

☐ Check this box if you are opening an SMA account that doesn't have a custodial account yet. This will ensure proper setup.

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5. Enter the information for the Donor/Grant Advisor. Select "Add Another Donor/Grant Advisor if entering 2 (two). *Please note if more than 2 Donor/Grant Advisors need to be entered, contact the RCF Client Services team.

Donor / Grant Advisor

Please enter the Donor / Grant Advisor's information for this account. You can add more account roles (such as other Donors, Grant Advisors, Successor Grant Advisors, etc.) after the account is approved.

First Name •
Example: John, Mary, etc.
Lewis

Last Name •
Example: Doe, Garcia, etc.
Hamilton

Phone Number •
Example: (123) 456-7890
(123) 456-7890

Email Address •
Donor email must not be attached to another account
fastestdriver@email.com

Date of Birth •
Date must be formatted MM/DD/YYYY
06/15/1991

Address Line 1 •
Enter street address or PO Box
123 F1 Driver

Address Line 2
Example: Apt 4

City •
Indianapolis

State / Province •
Indiana

Postal Code •
46240

+ Add Another Donor / Grant Advisor

Reset Application

Continue to Review

6. Select Continue to Review

7. Review the details of the Primary Financial Advisor and Donor/Grant Advisor(s). Select "Edit Application" to change any detail. Once confirm, select "Submit Application."
    a. *Please note, once the application has been submitted, no further edits can be made without support from the RCF Client Services team.
    b. *Please note, the DAF name will automatically generate upon submitting the application. You may contact the RCF Client Services team with any questions or requests for changes upon completing the application entry and DocuSign process.

Review Donor-Advised Fund Application

Donor-Advised Fund Details

Please review your account details for accuracy and make any necessary changes before clicking "Submit Application." Once the account is approved, you'll be able to make contributions, add additional account roles (such as other Donors, Grant Advisors, or Successor Grant Advisors, etc.), and update statement preferences.

Please note, your DAF account name will be automatically generated upon submitting the application. You may contact the client services team with any questions or requests for changes upon completing the application entry and Docusign process.

Primary Financial Advisor

Chelsea Dardy

CRD [redacted]

Office Phone Number: (123) 456-7890

Email Address: bestadvisor@nm.com

Custodial Account Firm: Pershing as Custodian

Custodial Account Number: 12C56789

Address:

8888 Keystone Crossing
Suite 1200
Indianapolis, IN 46240

Donor / Grant Advisor

Lewis Hamilton

Phone Number: (123) 456-7890

Email Address: fastestdriver@email.com

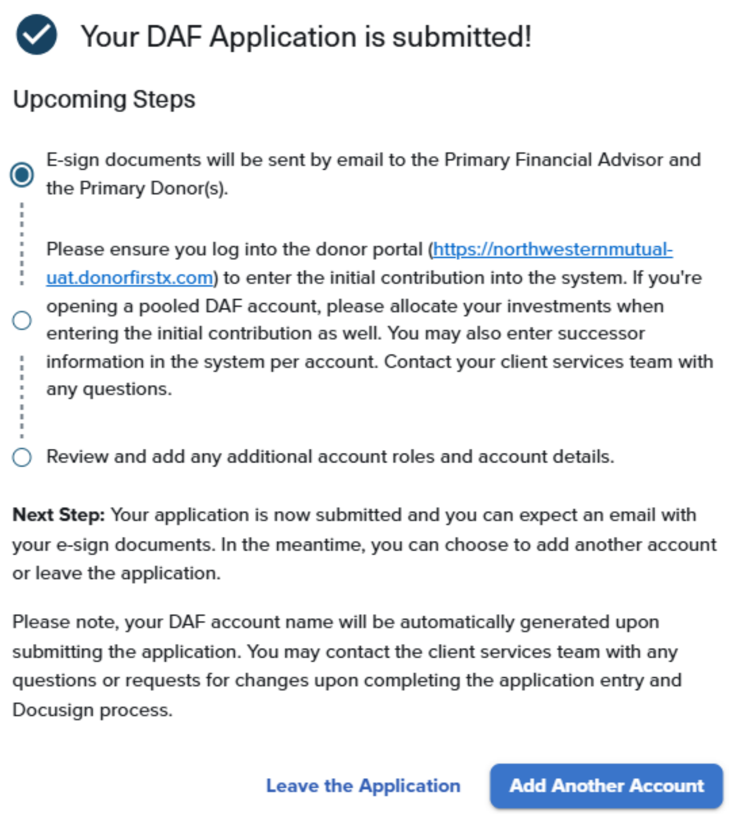
Date of Birth: 06/15/1991

Address:

123 F1 Driver
Indianapolis, IN 46240

Edit Application | Submit Application

8. You will receive confirmation of next steps.



Your DAF Application is submitted!

Upcoming Steps

- E-sign documents will be sent by email to the Primary Financial Advisor and the Primary Donor(s).
- Please ensure you log into the donor portal (https://northwesternmutual-uat.donorfirstx.com) to enter the initial contribution into the system. If you're opening a pooled DAF account, please allocate your investments when entering the initial contribution as well. You may also enter successor information in the system per account. Contact your client services team with any questions.
- Review and add any additional account roles and account details.

Next Step: Your application is now submitted and you can expect an email with your e-sign documents. In the meantime, you can choose to add another account or leave the application.

Please note, your DAF account name will be automatically generated upon submitting the application. You may contact the client services team with any questions or requests for changes upon completing the application entry and Docusign process.

Leave the Application | Add Another Account

9. The Primary Financial Advisor and Donor/Grant Advisor(s) will receive an email from DocuSign to complete acknowledgement of the application.
10. After all parties have signed, user credentials to access the DAF account at https://NorthwesternMutual.DonorFirstX.com will be issued. The account is now in a ready-for-funding status!
11. A member of the RCF Client Services team will confirm receipt of the DAF application. Please send proof of the initial contribution to NM@reninc.com to finalize the account!

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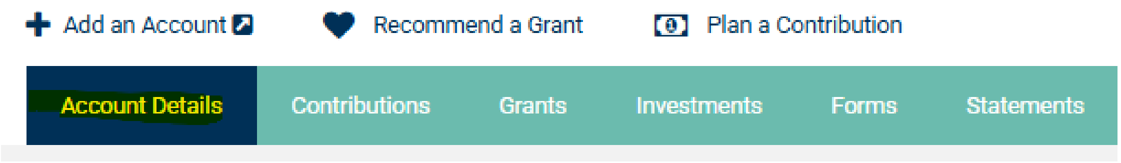
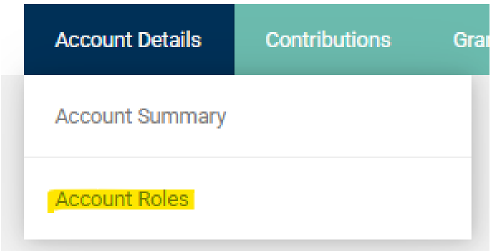
Add additional roles (successor grant advisor or charitable remainder beneficiary)

Additional roles can be added once the application is submitted and the Docusign process is complete. After either the financial advisor or donor(s) receives the credential email, take the steps below to add Individual Successor Grant Advisors **or** Charitable Remainder Beneficiaries.

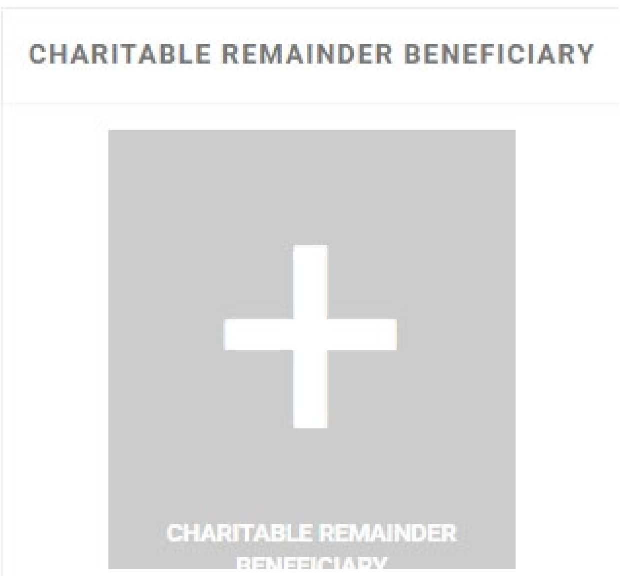
1. Login to the donor portal and hover over the Account Details tab



2. Select "Account Roles"



3. Scroll to the type of user you wish to insert and select the plus sign. This will specify the required details needed to add this role.
   Examples:



Should you have any questions or concerns regarding the additional role process, please contact our Ren Client Services team for support!