



### GIVING FUND APPLICATION

This Giving Fund Application establishes your charitable fund within SDG Global, through which you may contribute assets, recommend grants, and participate in long-term philanthropic planning, including donor advised funds, pooled income funds, and charitable remainder trust structures where applicable.

The Donors of the account have full and equal rights to recommend grant distributions and to elect the successors of the account. There can be more than two Donors. (Please attach additional sheets if necessary.)

<b>DONOR #1 (Primary recipient for all account communication)</b>	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Other	
NAME (First, Last)/ ORGANIZATION	
NAME OF RESPONSIBLE PARTY	
MAILING ADDRESS	
CITY/ STATE/ZIP	
MOBILE	
EMAIL	
<b>DONOR #2 (Primary recipient for all account communication)</b>	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/> Other	
NAME (First, Last)/ ORGANIZATION	
NAME OF RESPONSIBLE PARTY	
MAILING ADDRESS	
CITY/ STATE/ ZIP	
MOBILE	
EMAIL	

## NAME THE GIVING FUND

Choose a name for your Giving Fund. You can name it after yourself, your family, or your cause (for example, “The Smith Family Philanthropy Fund” or “The Smith Family Foundation”). Grant letters to charities will include the account name and the name and address of the primary Donor(s), unless anonymity is requested.

GIVING FUND NAME

## FINANCIAL ADVISOR

If you are currently working with a financial advisor, would you like to give him/her access to your account?

YES

NO

(If NO, please move on the succession plan section)

ADVISOR NAME

FIRM NAME

MAILING ADDRESS

CITY/STATE/ZIP

DAYTIME PHONE

EMAIL

## FINANCIAL ADVISOR

**This individual has:**

Full Access (*authority to recommend investment allocations*)

Read-Only Access (*can see and receive statements*)

### LEGAL NOTE:

- Advisor is NOT a fiduciary of the Fund
- Advisor cannot control assets

## SUCCESSION PLAN

DONORS HAVE THE OPTION OF:

1. Supporting one of SDG Global's permanent funds, used for: education, health, human services, and/or disaster relief initiatives worldwide.
2. Electing individuals to succeed them on the account with full rights as Donors,
3. Or, recommending charitable organizations to receive the remaining assets, as the beneficiary upon the death, incapacity or other disqualification of ALL Advisors of the account.

*Note: You may choose a combination of all three (total must equal 100%). If no option is selected, the succession plan will default to Option (1). A Donor can change this election at any time by notifying SDG Global, in writing*

1. I would like to name SDG Global as the beneficiary of the Giving Fund.

\_\_\_\_\_ % OF GIVING FUND VALUE

2. I would like to name the following individual(s) as beneficiaries of the Giving Fund. *Please select one of the following options to determine how the account will be held by the successor(s):*

Person(s) name below succeeds the account with full rights as Donor(s).

## SUCCESSOR #1

NAME (First Middle Last)

MAILING ADDRESS

CITY/STATE/ZIP

EMAIL

DAYTIME PHONE

## SUCCESSOR #2

NAME (First Middle Last)

MAILING ADDRESS

CITY/STATE/ZIP

EMAIL

DAYTIME PHONE

3. I would like to name the following Charitable Organizations as beneficiaries of the Giving Fund. Consider the below-named organizations as recommended grant recipients upon the death or legal incapacity of all Donors. (Please list additional organizations and percentages on a separate page.)

**ORGANIZATION #1**

ORGANIZATION

FEDERAL TAX ID

PHONE

MAILING ADDRESS

CITY/STATE/ZIP

MAILING ADDRESS

CITY/STATE/ZIP

**SIGNATURES**

I acknowledge that I have reviewed the Program Guidelines and Gift Acceptance Policy. I also acknowledge that I have read the Giving Fund Application Form and agree to the terms and/or conditions described therein. I understand that any contribution, once accepted by SDG Global, represents an irrevocable contribution and is not refundable to me. I hereby certify that, to the best of my knowledge, all information presented in connection with this form is accurate, and I will promptly notify SDG Global in writing of any changes. (Please attach any additional donor signatures.)

DONOR 1 SIGNATURE

TITLE

DONOR 1 PRINT NAME

DATE

DONOR 2 SIGNATURE	TITLE
DONOR 2 PRINT NAME	DATE

**LEGAL NOTE**

SDG Global Impact Fund, Inc. (Tax ID 41-3966108) is a Wyoming based nonprofit public charity recognized as tax-exempt under Section 501(c)(3) of the Internal Revenue Code. Contributions to SDG Global are irrevocable charitable gifts and may be tax-deductible to the extent permitted by law. SDG Global retains full legal control and discretion over all contributed assets and the approval of grants.

Assets held in charitable funds may be invested in accordance with the organization’s investment policies and are subject to market fluctuations. Investment values may increase or decrease over time.

SDG Global does not provide legal, tax, or investment advice. Donors are encouraged to consult their professional advisors regarding the tax and financial implications of charitable contributions.

Donor represents that all contributed assets are derived from lawful sources.

Donor relinquishes ownership and all rights to donated assets. SDG Global retains full legal control.

Donated assets may not be used for: personal benefit, pledge fulfillment, nor political use of any kind.

All grant recommendations are advisory and subject to approval by SDG Global.

SDG Global retains variance power over all funds in accordance with its governing documents.

**FEE SCHEDULE**

SDG Global holds a distinct principle regarding our fee structure: it is considered a payment for impact and mission aligned services and will always remain entirely transparent and inclusive of all that the SDG Global is able to offer, for the life of our relationship.

SDG Global's Administration Fee for all new accounts, and for all new assets received into an account is 5% (five percent). SDG Global reserves the right to adjust fees for complex or large-scale contributions.

The 5% Administration Fee will be executed upon the creation of your account for all new assets donated. It will be executed ongoing for the life of your account up front, one time only when each new asset is donated into the account. There are no asset management fees or any other hidden or additional fees over time. Additionally, there are no fees on growth of assets held in your account. All growth of assets held in your account both short and long-term, remains entirely in your account, available to be granted/invested as you recommend.