

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

As the owner of the 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.

Clearly indicate on the 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 account. 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:	8910 Purdue Road, Suite 555, Indianapolis, IN 46268		
Phone Number:	866-803-0389		
Entity Email:	RCF@reninc.com		
Delivery Preferences:	Email 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 <i>NO</i> beneficial owners		
Control Person:	Gregory W. Baker		
Annual Income:	\$1M+		
Net worth:	<div> <div>\$1B+</div> <div> <div>Mutual Funds: \$400M/30%</div> <div>Stocks: \$400M/30%</div> <div>Real Estate: \$2M/<0%</div> </div> <div> <div>Annuities/Insurance: \$50M/4%</div> <div>Cash: \$100M/7%</div> <div>Bonds: \$200M/15%</div> </div> <div> <div>Hedge Funds/Alternatives: \$100M/7%</div> <div>Other: \$100M/7%</div> </div> </div> <div>Based on the information above, RCF is a Qualified Investor, Qualified Purchaser, Accredited Investor, and is an Institutional Investor.</div>		
Source of Income:	Gifts/sale of existing assets		
Federal Income Tax Bracket:	0%		
Investment Experience:	20+ years (all investment types)		
Investment Knowledge:	Extensive knowledge of Stocks, Bonds, Cash, Real Estate, Insurance, Annuities, SMAs, ETFs, and Hedge Funds. Limited knowledge of Options, Futures, Commodities, Foreign, and Unit Trusts		
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.		