

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 RCF@reninc.com. If using e-signature, please send directly to Greg Baker (gregbaker@rcgf.org) and Douglas Cox (coxd@reninc.com) 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

<b>Account Title</b>	Renaissance Charitable Foundation Inc. ATTN *DAF Account Name*. For example: Renaissance Charitable Foundation Inc. ATTN: Juan & Maria Smith Charitable Gift Fund															
<b>Address</b>	8910 Purdue Road, Suite 555, Indianapolis, IN 46268															
<b>Contact and Requests</b>	866-803-0389 or RCF@reninc.com															
<b>NAICS Industry Code</b>	813211															
<b>Delivery Preferences</b>	Email for investment account statements ONLY to RCFSTMT@reninc.com															
<b>Federal Tax ID Number</b>	35-2129262															
<b>IRS W-9 Exempt Payee Code</b>	ONE															
<b>IRS W-9 Exempt FATCA Code</b>	A															
<b>Account Type</b>	Select the option on the account application that best applies to RCF's status as a non-profit entity and C-corporation.															
<b>Beneficial Owners</b>	As a charity, there are NO beneficial owners															
<b>Control Person</b>	Gregory W. Baker															
<b>Annual Income</b>	\$1M+															
<b>Net Worth</b>	<p>\$3B+</p> <table> <tr> <td>Mutual Funds:</td> <td>\$1.5B</td> <td>50%</td> </tr> <tr> <td>Stocks:</td> <td>\$1B</td> <td>30%</td> </tr> <tr> <td>Alternatives:</td> <td>\$300M</td> <td>10%</td> </tr> <tr> <td>Bonds:</td> <td>\$150M</td> <td>5%</td> </tr> <tr> <td>Cash:</td> <td>\$150M</td> <td>5%</td> </tr> </table> <p>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.</p>	Mutual Funds:	\$1.5B	50%	Stocks:	\$1B	30%	Alternatives:	\$300M	10%	Bonds:	\$150M	5%	Cash:	\$150M	5%
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<b>Time Horizon and Liquidity Needs</b>	Account Time Horizon: 5-10 years Annual Expenses: 5% Special Expenses Time Frame: 5+ years
<b>Source of Income</b>	Gifts/sale of existing assets
<b>Federal Income Tax Bracket</b>	0%
<b>Investment Experience</b>	20+ years (all investment types)
<b>Investment Knowledge</b>	(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
<b>Trusted Contact</b>	Because RCF is a nonprofit corporation with multiple officers listed on each account, a Trusted Contact is not necessary.
<b>Margin Trading</b>	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.

<b>Account Title</b>	Renaissance Charitable Foundation
<b>Account Type</b>	Checking
<b>Account Number</b>	1361716
<b>Routing Number</b>	074006674 (this is also used for ACH and Wires)
<b>Account Signers for Renaissance</b>	Gregory W. Baker and Douglas W. Cox
<b>Bank Address</b>	The National Bank of Indianapolis 107 N. Pennsylvania St. Suite 700 Indianapolis, IN 46204