

Thank you for choosing the Renaissance Charitable Foundation (RCF) Donor-Advised Fund (DAF) program for Ameriprise Clients! 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 Ameriprise investment account, owned by Renaissance Charitable Foundation.
 - a. Advisors can locate the Donor-Advised Fund (DAF) Reference, aka ASK 1982, by typing the following "Donor Advised Funds" or "1982" into the AdvisorCompass Search Bar.
 - b. Links are also found on the Mutual Funds Overview Product Page
 - c. Please also feel free to contact the Ameriprise Service & Operations New Business team at (800) 297-6663 and say "New Business."
- 2. Begin the DAF application through the donor portal: https://AMPF.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:
 - o Nonprofit Name: Renaissance Charitable Foundation Inc.
 - o EIN/Tax ID: 35-2129262
 - o 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.



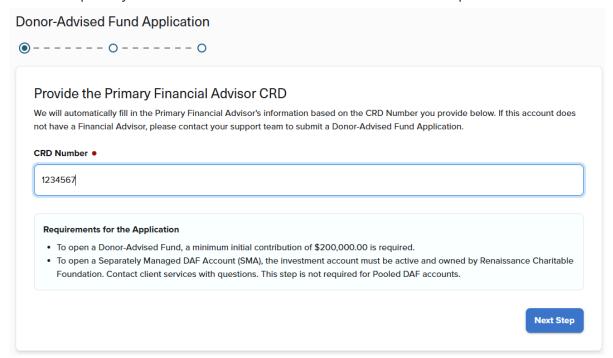


Online Application Entry – net new DAF

1. Navigate to https://AMPF.DonorFirstX.com and select "Create Account" from the upper right-hand corner then select "Open Online"



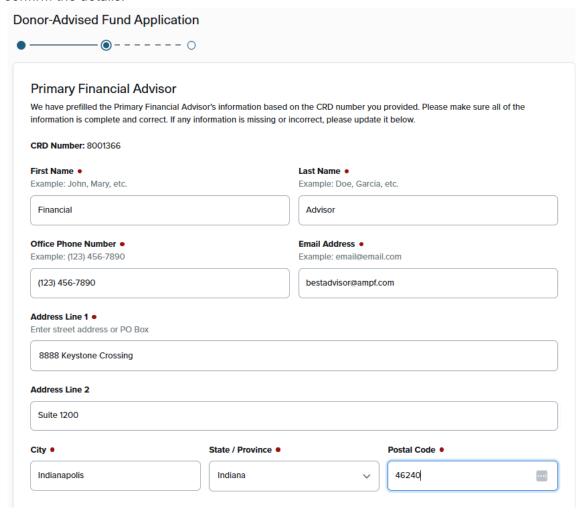
2. Enter the primary financial advisor's CRD Number and select Next Step.



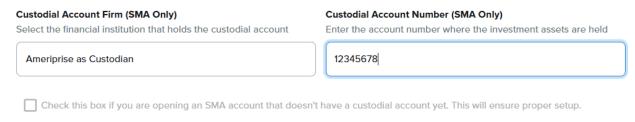




3. Based on the CRD record, the primary financial advisor's information will pre-populate. Please confirm the details.



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



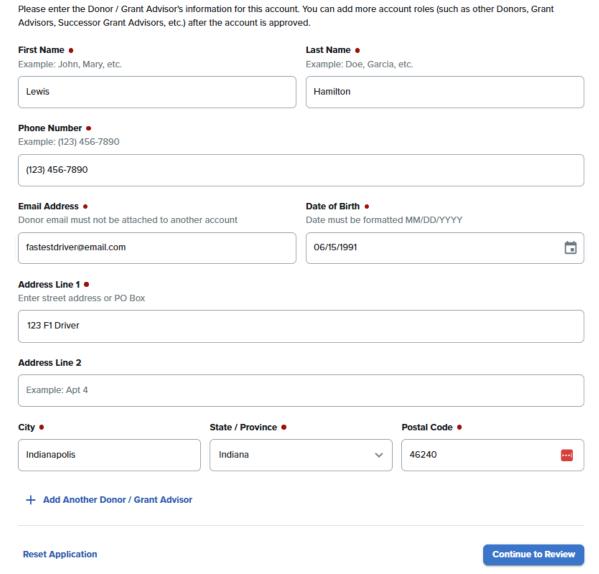




Donor / Grant Advisor

Any donor. Any gift. Any charity.

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.

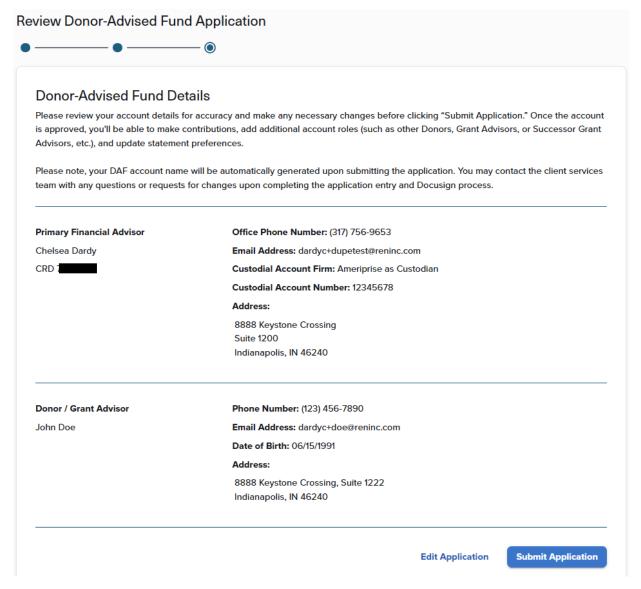


6. Select Continue to Review





- 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.
 - *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.







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://ampf-uat.donorfirstx.com) to enter the initial contribution into the system. If you're opening a pooled

- O 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://AMPF.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 ampf@reninc.com to finalize the account!

