Renaissance Charitable

# How to Open a LPL Renaissance Charitable Donor-Advised Fund

1. Open Investment Account
2. Submit the Online DAF Application
3. Docusign the DAF Application
4. Login and Create Your Password
5. Send Proof of Funding
6. Account Ready for Granting

### Before you begin:

- Review and provide the LPL program circular to your client.
- For all investment account documentation, Renaissance Charitable Foundation (RCF), not the donor, must be listed as the account owner.
- Your firm may require you to be licensed in Indiana to proceed. Check with your compliance department before getting started.

## 1. Open the Investment Account

Download Articles of Incorporation and Corporate Resolution for upload during the account setup. Enter application through Clientworks, view instructions here.

Completed examples of LPL application and paperwork:
LPL Brokerage or Advisory Account Application for Non-Retirement Account, Entity Information-Corporate Resolution, Beneficial Ownership-Legal Entity Owner by Individuals, and Account Features-Electronic Prospectus Delivery.

Send the LPL investment paperwork for e-signature to the below recipients:

**Gregory W. Baker**
gregbaker@rcgf.org | 317-501-3133

**Alyssa J. Rysdyk**
alyssarysdyk@rcgf.org | 616-828-3377

RCF will return signatures within 5–7 business days.
Contact number listed for text confirmation of e-signature requests ONLY.

Establish the RCF-owned investment account after signed paperwork is returned.

*Do NOT move forward to step 2 until the investment account is fully open with the account number and signed paperwork.*

## 2. Submit the Online DAF Application

*You'll need the primary financial advisor's CRD number and the investment account number to complete this step.*

**New Advisor**
Start the application here

**Existing Advisor**
Please log-in to your account and select 'Add an Account'

## 3. Docusign the DAF Application

Check your inbox for a DocuSign requests from **DAFappSupport@reninc.com** with the **Subject Line Sign Your DAF Application**. The email goes to the primary advisor and donor(s) listed on the application only.

## 4. Login and Create Your Password

**New Advisors and Your Client**

You and your client will receive a welcome email from do_not_reply@reninc.com containing a link to complete your credentials. Use it to log in and set your permanent credentials within 48 hours. If you or your client missed this window, go to rcf.donorfirstx.com, select **Log In** and then click **Create or Reset Password**.

**Existing Advisor**

You will find the new account under **Account Listing** in the Donor Portal.

***Note:*** *The account will have $0 balance until the next step is complete, please wait to recommend a grant until the balance appears.*

## 5. Send Proof of Funding

Once the investment account is funded, please send the below information to rcf@reninc.com with **Subject Line: Proof of Funding LPL [Account Name]**.

**Body of the Email**

Donor Name

DAF Account Code (as detailed in your credential email)

**Screenshot of the investment account or statement that includes:**

Investment Account number

Asset Type

Number of shares / cash amount

Asset Name

Date of initial funding

Ren will review and post the contribution to the account.

## 6. Account Ready for Granting

Once Ren does a final review the account will be placed in grant ready status.

***Please Note:*** *Once your grant has been submitted and passed vetting, an invoice will be available in the Donor Portal under DAF Insights, where you will find instructions on how to fund your grant.*