Renaissance Charitable

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How to Open a 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. Submit Proof of Funding
6. Account Ready for Granting

Before you begin:

- Review and provide the 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

Send the investment paperwork for e-signatures to the below recipients, ensure the areas that need signature are highlighted:

Ann Marie La Porta
AnnMarieLaPorta@rcgf.org | (234) 200-8396

Christopher A. Gervaise
ChrisGervaise@rcgf.org | (234) 200-8677

If applicable, Corporate Secretary: Cheryl L. Casey – cherylcasey@rcfgf.com | (234) 380-4409

RCF will return signatures within 2–3 business days.

Important Notes:

- **Contact numbers listed for text confirmation of e-signatures ONLY**
- Ensure investment paperwork is filled out with correct information before sending to avoid delays.
- If necessary, download RCF's Articles of Incorporation, Corporate Resolution and other legal documents.

Established 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. If you or your client missed the window to set-up, 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. Submit Proof of Funding

Once the investment account is funded, please submit the proof of funding in the Donor Portal via the account details page. You will need to upload either a screenshot of the account activity/transactions OR an account statement PDF that shows the below. Summary and positions screenshots are not accepted.

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 on your Donor Portal in the Engagement Hub. There, you'll find instructions on how to fund your grant.