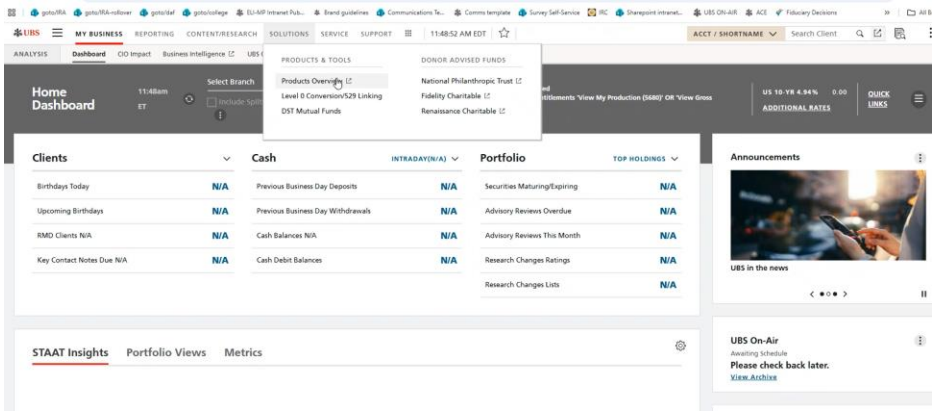
New DAF Online Application Step by Step

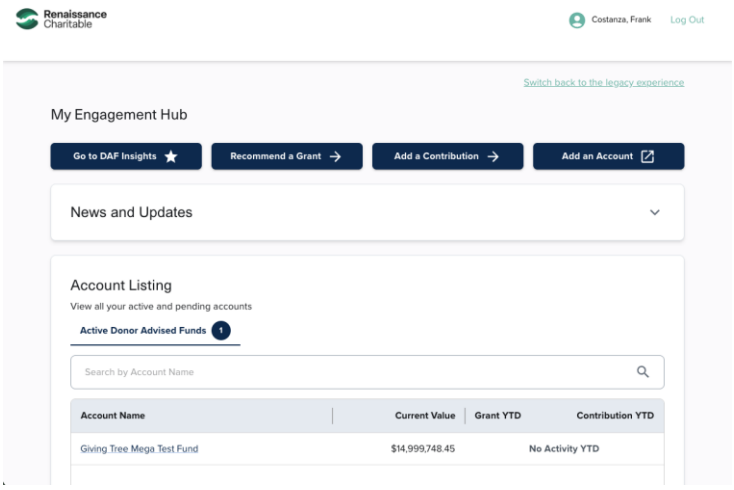
The new online application introduces automated workflows, eliminates manual handoffs, and generates signature-ready documents almost instantly, while a streamlined, low-touch experience reduces donor drop-off and keeps applications moving forward. We encourage you to start using this online application.

Paper applications will still be accepted until the end of year, but we request that the investment account number is provided when sent.

How to Access DAF Application

New: Go to ubs.donorfirstx.com and Select Create DAF Account
Existing: On UBS ACE platform, go to SOLUTIONS, select Renaissance Charitable under Donor Advised Funds to open the Giving Platform. On the Engagement Hub, select **Add an Account**.



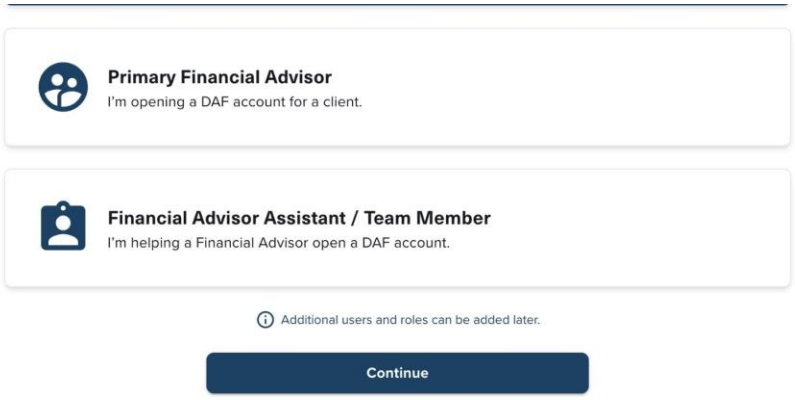


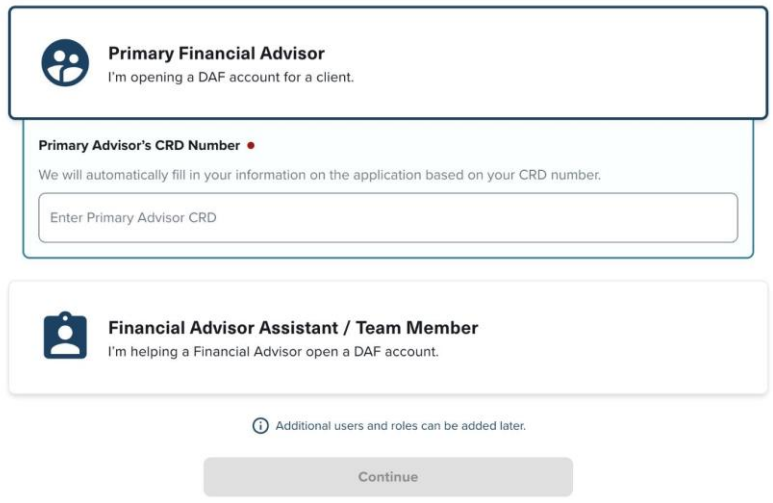
How To Fill Out the Application

The new application is designed to be quick and straightforward, with just two pages needed to collect the information required to open a DAF.

Step 1: Identify Your Role

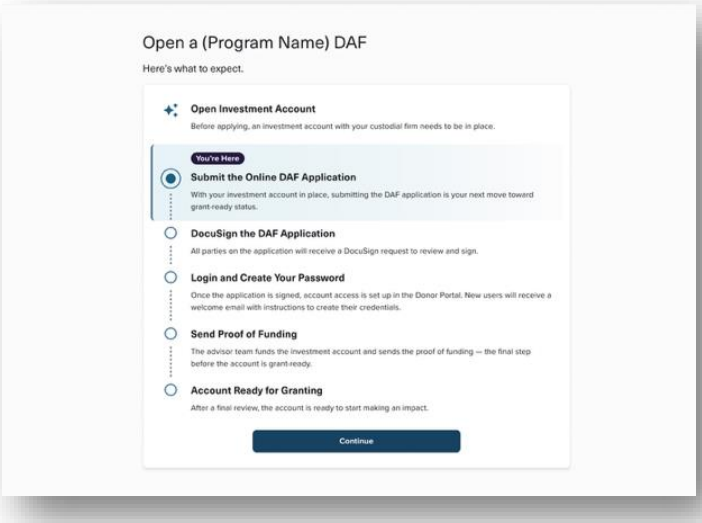
Begin by selecting the role on the account you are opening. You will be asked to enter the primary advisor CRD (Central Registration Depository) number so we can identify them and streamline the rest of the application. For future account opening, the CRD number will be prefilled if logged in.

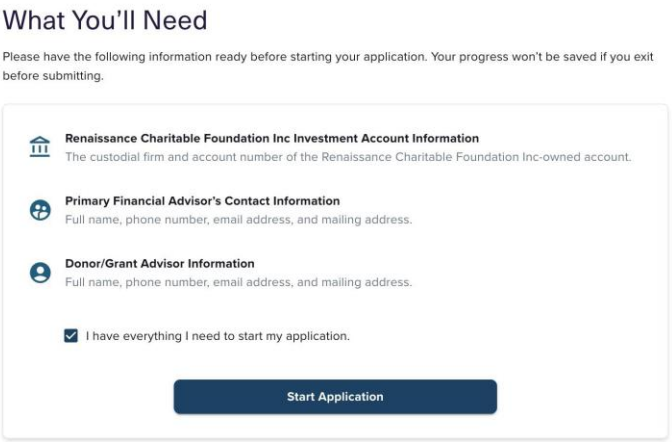




Step 2: Review Account Opening Steps and Information Needed for the Application

The first screens detail all the steps needed to get an account grant ready, as there are more steps after submitting the application. The second screen will detail the information required to complete your submission. The investment account MUST be opened prior to submitting the DAF application. To note: Sending Proof of Funding is not needed for UBS advisors.

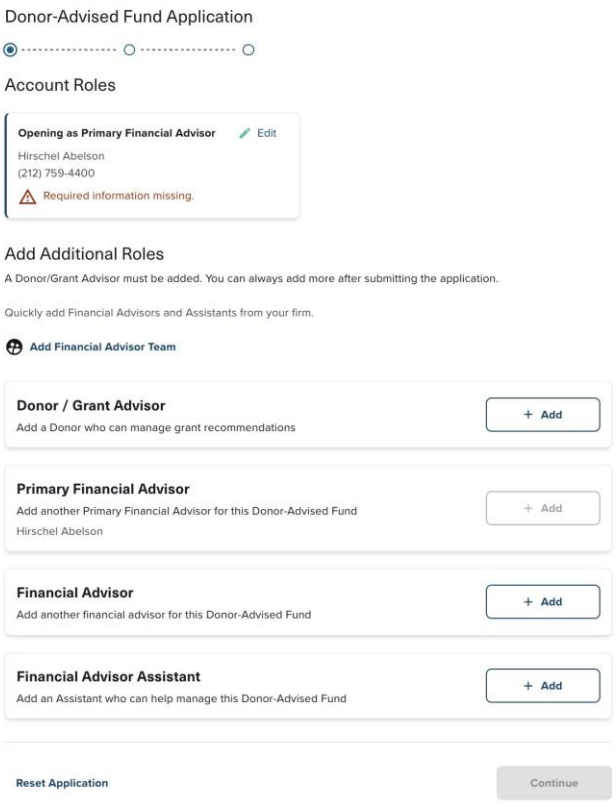


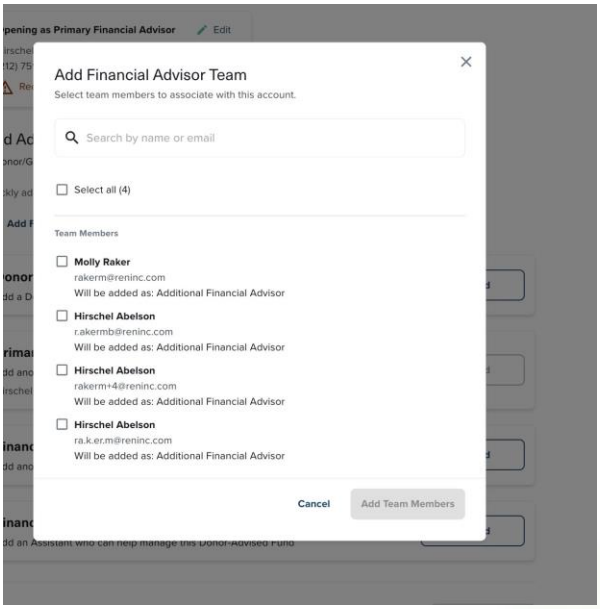


Step 3: Enter All Account Roles

Fill in the remaining required information on the primary advisor based on the CRD number, as well as add in the Donor(s) and the Advisor team's information.

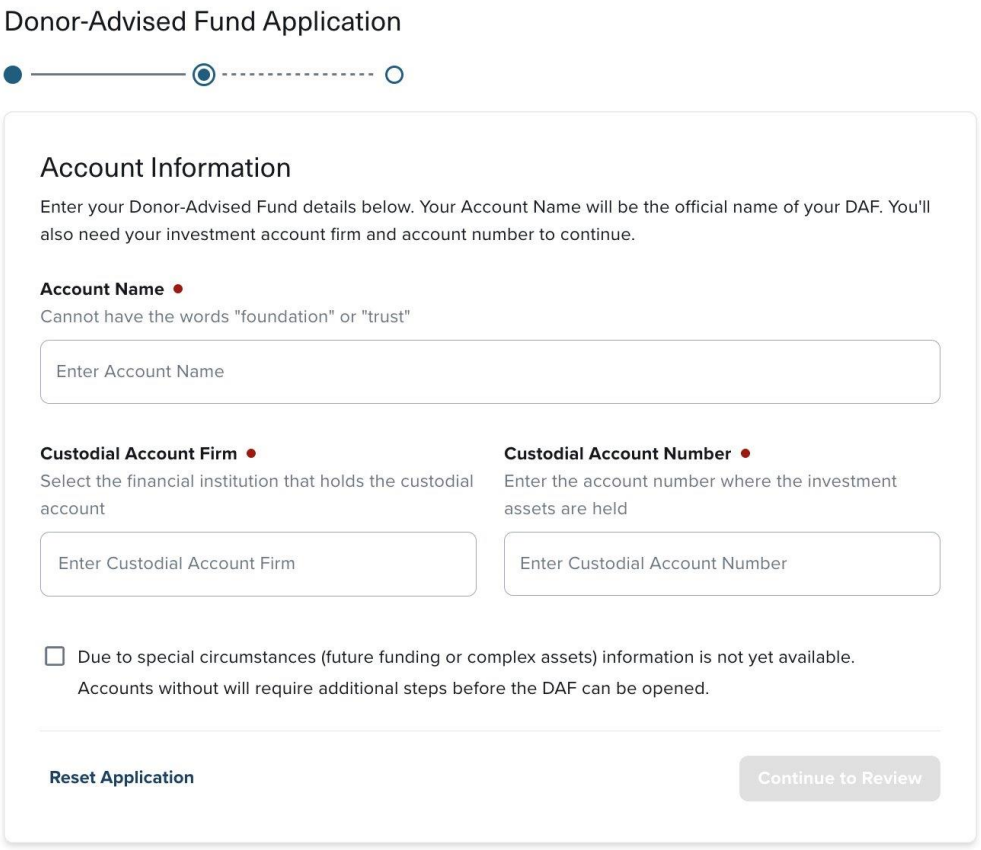
You can add other Advisors or assistants by choosing Add Financial Advisor Team, to select existing advisors from your other accounts. No need to enter all their details again.



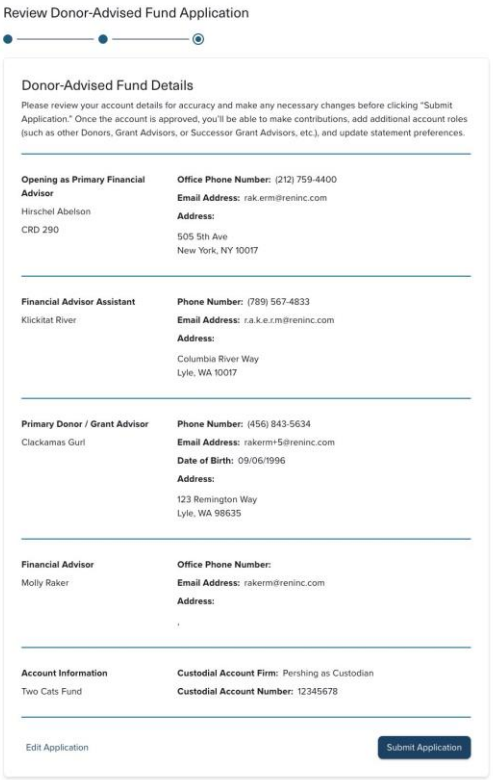


Step 4: Account Information

After adding the account roles, fill in the Account Name and the Investment Account details.

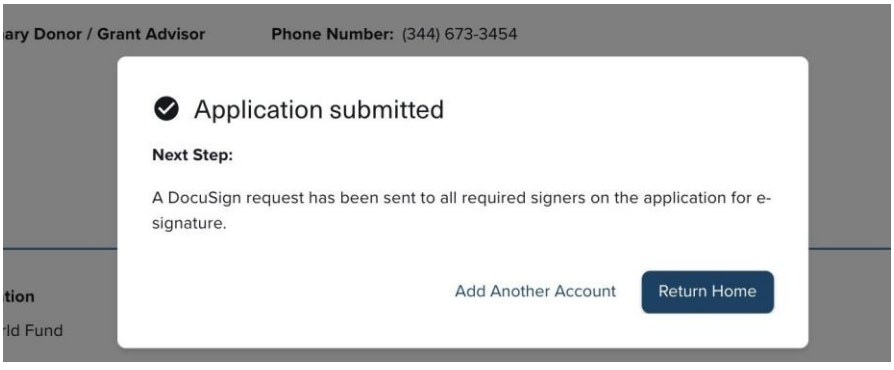


Step 5: Review Application Details and Submit



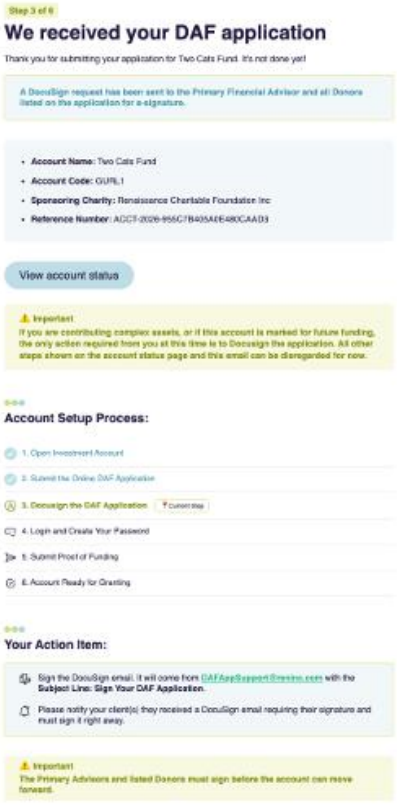
Step 6: Submit and Next Steps

Once you submit the application, you'll see a confirmation message outlining what happens next and any additional actions that may be required.



Two emails will be sent:

1. Docusign Envelope for signature to the Primary Advisors and Donor(s)
2. Confirmation Email after submission from Ren with a link to track the status of the account and outlining additional steps to do before the account is grant-ready. Subject Line: {Account Name} DAF Application Received



Step 3 of 6

We received your DAF application

Thank you for submitting your application for Two Cats Fund. It's not done yet!

A DocuSign request has been sent to the Primary Financial Advisor and all Donors listed on the application for e-signature.

- Account Name: Two Cats Fund
- Account Code: GUPL1
- Sponsoring Charity: Renaissance Charitable Foundation Inc
- Reference Number: ACCT-2026-955C7B405AEE480CAAD3

View account status

Important
If you are contributing complex assets, or if this account is marked for future funding, the only action required from you at this time is to Docusign the application. All other steps shown on the account status page and this email can be disregarded for now.

Account Setup Process:

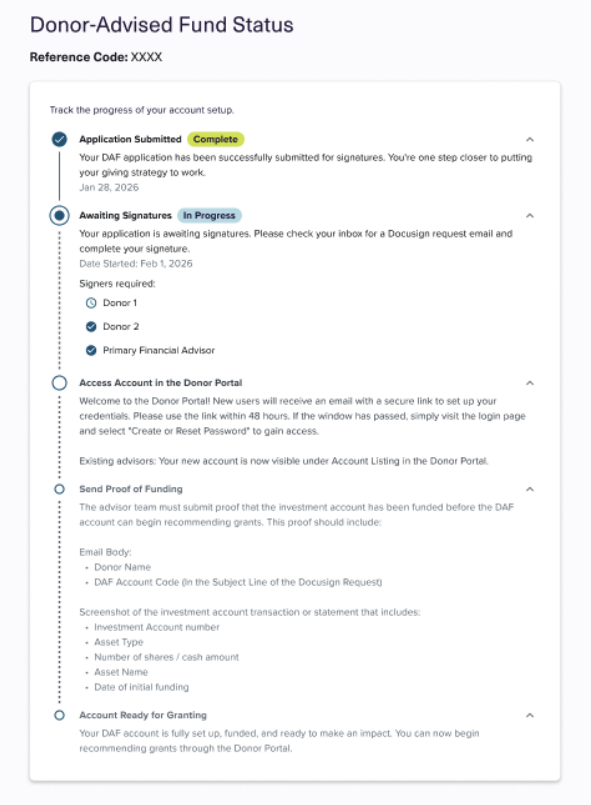
1. Open Investment Account
2. Submit the Online DAF Application
3. Docusign the DAF Application — Current Step
4. Login and Create Your Password
5. Submit Proof of Funding
6. Account Ready for Granting

Your Action Item:

Sign the DocuSign email. It will come from DAFAppSupport@reninc.com with the Subject Line: Sign Your DAF Application.

Please notify your client(s) they received a DocuSign email requiring their signature and must sign it right away.

Important
The Primary Advisors and listed Donors must sign before the account can move forward.



Donor-Advised Fund Status

Reference Code: XXXX

Track the progress of your account setup.

Application Submitted Complete
Your DAF application has been successfully submitted for signatures. You're one step closer to putting your giving strategy to work.
Jan 28, 2026

Awaiting Signatures In Progress
Your application is awaiting signatures. Please check your inbox for a Docusign request email and complete your signature.
Date Started: Feb 1, 2026
Signers required:
- Donor 1
- Donor 2
- Primary Financial Advisor

Access Account in the Donor Portal
Welcome to the Donor Portal! New users will receive an email with a secure link to set up your credentials. Please use the link within 48 hours. If the window has passed, simply visit the login page and select "Create or Reset Password" to gain access.

Existing advisors: Your new account is now visible under Account Listing in the Donor Portal.

Send Proof of Funding
The advisor team must submit proof that the investment account has been funded before the DAF account can begin recommending grants. This proof should include:

Email Body:
- Donor Name
- DAF Account Code (in the Subject Line of the Docusign Request)

Screenshot of the investment account transaction or statement that includes:
- Investment Account number
- Asset Type
- Number of shares / cash amount
- Asset Name
- Date of initial funding

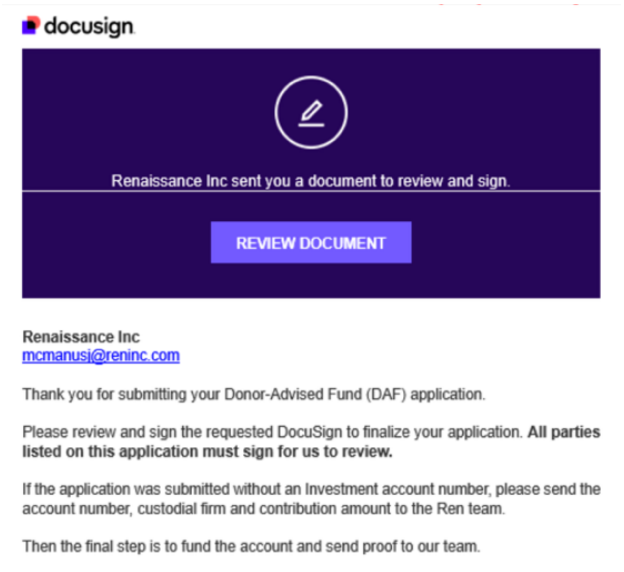
Account Ready for Granting
Your DAF account is fully set up, funded, and ready to make an impact. You can now begin recommending grants through the Donor Portal.

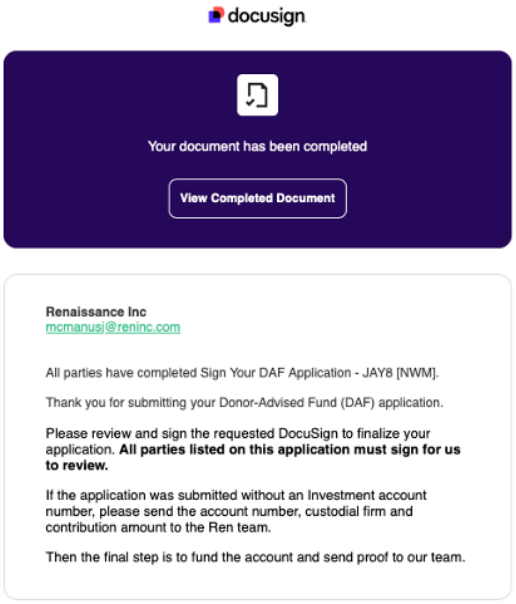
Signing the Application - DocuSign

You'll receive an email from Docusign with a link to electronically sign your DAF paperwork. The application will not move forward until all required parties listed in the application—including the Financial Advisor and any donor(s)—have completed their signatures.

From: <dafappsupport@reninc.com>

Subject Line: Sign Your DAF Application - [Account CODE] - [ISP Code]





After the application is fully signed, ensure assets are moved to the Investment Account. The DAF account will go into an account review. This takes 2–4 business days. Until then, the balance shows $0. Nothing for you to do. Once we post and review the account, the account is grant-ready.