



Giving Together.  
Building Community.

## New fund form

Thank you for choosing to partner with Pride Foundation in your giving. Please use this form to establish any type of fund at Pride Foundation. More information on the funds can be found in the "Change the Future" brochure or by contacting Pride Foundation.

## Donor information Please complete for every fund.

Funds can be established by one or more people, corporations or not-for-profit organizations. Please list your information below:

### DONOR 1

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

I prefer contact by:  home phone  work phone  cell phone  email  mail

### DONOR 2

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

I prefer contact by:  home phone  work phone  cell phone  email  mail

## DONOR 1

Are you working with a professional advisor?

Attorney  CPA  Financial Planner  Other

Professional Advisor's Name

Business Name

Mailing Address

City, State, Zip

Business Phone

Email

## DONOR 2

Are you working with a professional advisor?

Same as Donor 1  Attorney  CPA  Financial Planner  Other

Professional Advisor's Name

Business Name

Mailing Address

City, State, Zip

Business Phone

Email

## FUND TYPE AND NAME

Pride Foundation offers different funds for donors to choose from. For more information on types of funds offered please refer to the "Change the Future" brochure. Please indicate type of fund(s) below:

Donor-Advised Fund  Scholarship Fund  Area of Interest Fund  Designated Fund

Grants made from a fund at Pride Foundation are identified with the name of the fund and the name of the donor(s) recommending the grant, unless you wish to remain anonymous. Please name your fund below:

Name of Fund:

Would you like to remain anonymous?  Yes  No

Would you like your fund name to remain anonymous?  Yes  No

Each Fund associated with Pride Foundation will contain a reference to Pride Foundation in its name (e.g., "The Pat Smith Fund of Pride Foundation")

## TYPE OF GIFT TO PRIDE FOUNDATION

The donor(s) hereby assigns, conveys, transfers and delivers to Pride Foundation the following described property:

Cash in the amount of \$

Securities, Publicly Traded (see information below)

Personal Property (please attach description)

Testamentary Gift (e.g. bequest, life insurance, or other planned gift), please specify

Other, please specify:

Please provide us with the following information if you are transferring publicly traded securities. Please contact Pride Foundation's development office for transfer procedures on all gifts other than cash and publicly traded stock.

Name of Stock

Number of Shares

Approximate Value

Investment Firm Name

Broker's Name

Broker's Business Phone

Broker's Fax

Broker's Email

Name of Stock

Number of Shares

Approximate Value

Investment Firm Name

Broker's Name

Broker's Business Phone

Broker's Fax

Broker's Email

# Type of Fund

Please complete section(s) for the fund(s) you are starting.

## Donor-Advised Funds

Donors establishing a donor-advised fund may designate people who will serve as advisors to the fund and who may make recommendations to Pride Foundation regarding grant distributions from the fund. Donors may designate themselves as advisors, or may designate others in addition to or instead of themselves.

Once designated, an advisor's status can only be revoked in writing by the donor(s) establishing the fund. All advisors to the fund will receive quarterly fund status reports and other mailings from Pride Foundation.

### ADVISOR 1

If Advisor 1 is the same as Donor 1, check here.

Name

Mailing Address

City, State, Zip

Home Phone

Work Phone

Cell Phone

Email

Relationship to Donor(s)

Comments

### ADVISOR 2

If Advisor 2 is the same as Donor 2, check here.

Name

Mailing Address

City, State, Zip

Home Phone

Work Phone

Cell Phone

Email

Relationship to Donor(s)

Comments

Individuals establishing a donor-advised fund may choose to create a succession plan for their fund in the event that the initial advisor(s) to this fund dies, resigns, or is otherwise unable to act in this capacity. In this case, please:

Transfer the balance of my fund to Pride Foundation's Grantmaking Program to support community needs.

If you have a particular area of interest (e.g. youth, arts, geographical area), please indicate it below:

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(If this option is checked, skip Successor Advisor Information Section below)

Transfer the balance of my fund to Pride Foundation's endowment

(If this option is checked, skip Successor Advisor Information Section below)

Transfer the balance of my fund into a designated fund to support the following charity/charities:

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(If this option is checked, skip Successor Advisor Information Section below)

## Successor Advisor Information

For donor-advised funds only.

A successor advisor is authorized to recommend grants from the fund in the event the advisors(s) named above dies, resigns, or is otherwise unable to act in this capacity. Once designated, a successor advisor's status can only be revoked in writing by the donor(s) establishing the fund. All advisors to the fund will receive quarterly fund status reports and other mailings from Pride Foundation. All successor advisors shall be entitled to designate in writing no more than two individuals to succeed them as advisors to the fund.

### SUCCESSOR 1

Name

Mailing Address

City, State, Zip

Home Phone

Work Phone

Cell Phone

Email

Relationship to Donor(s)

Comments

## SUCCESSOR 2

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Relationship to Donor(s) \_\_\_\_\_

Comments \_\_\_\_\_

## Scholarship Fund

Donors may establish scholarship funds for the purpose of making grants to individuals to be used exclusively for tuition, fees, books and supplies. Scholarships are never given directly to the student unless authorized by Pride Foundation, but instead are given to their educational institution. Scholarship funds are administered by Pride Foundation in accordance with its scholarship guidelines and procedures.

Will you:

- a. Use Pride Foundation's general scholarship criteria and scholarship committee; or
- b. Create your own criteria and have Pride Foundation convene a committee?

Suggested criteria for the scholarship fund:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Area-of-Interest Fund

Donors establishing area-of-interest funds may recommend that the Foundation make distributions from the fund for certain charitable purposes. Please indicate the category/categories of interest (i.e. youth, arts, outreach) and/or the geographic area in support of which you would like distributions from the fund to be made.

Describe area(s) of interest:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Designated Fund & Nonprofit Endowment Funds

Donors or organizations establishing a designated fund or nonprofit endowment fund may recommend that distributions of income from the fund be made to one or more section 501 (c)(3) public charities, or to support one or more endowment funds established by Section 501 (c)(3) public charities at Pride Foundation (collectively referred to as "qualifying charitable recipients"). Please indicate the qualifying charitable recipient(s) that you would like to receive distributions from the fund. In the case of nonprofit organization donors, please designate your organization and any other qualifying charitable recipients that you wish to receive distributions from the fund. Changes in designation can be made in writing to Pride Foundation at any time. Please attach a separate sheet for more than three designees.

Name of Organization	Percent Payable
_____	_____ %
_____	_____ %
_____	_____ %
	100%

## Fund Distribution and Longevity Please complete for every fund.

Funds established at Pride Foundation can be established for different durations, from short term to in perpetuity. Please select how you would like your fund established:

**Current Use Fund**

(\$5,000 minimum, to be used within two years of being established.)

**Quasi-Endowed**

(\$25,000 minimum, invested as endowed, must be expended within 15 years of being established.)

The Fund will:

award \$\_\_\_\_\_ per year (\$1,000 min).

award a percentage of the value of the fund, as valued on December 31 (\$1,000 min).

This percentage will be determined as:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Endowed**

(\$25,000 minimum. Distributions of income only, subject to Pride Foundation's spending policy.

Generally 5% of the fund will be made available for granting every year.)

**PRIDE FOUNDATION TO COMPLETE**

This fund will be assessed an administrative fee at:  2%  1.5%  1%

Fees for this fund will be charged:  when received  April 1, 20\_\_\_\_\_.

PRIDE FOUNDATION  
1122 E. Pike Street PMB 1001  
Seattle WA 98122  
206-323-3318 local  
800-735-7287 toll free  
giving@pridefoundation.org

**PrideFoundation.org**