



Application and Prequestionnaire

- 1. Name of Donor(s):
2. Name of Fund shall be:
3. Designated Organization aka the Beneficiary:
4. Purpose of the Fund shall be:
5. Donor's Contribution. Donor irrevocably assigns, conveys, transfers and delivers to the Catholic Foundation of Michigan an opening contribution of \$
a. Please select your preferred method for the initial contribution:
- Check - Made payable to the Catholic Foundation of Michigan with the name of the fund in the memo.
- Wire Transfer; Please contact the foundation for instructions
- Other
- Publically Traded Securities or Mutual Funds. Name of Stock or Fund
6. Additional gift: The donor wishes to make a contribution to the Catholic Foundation of Michigan Endowment for the long-term financial support of building Catholic philanthropy in the amount of \$
7. Final Distribution Plan Upon the date of death of the last surviving Advisor or upon the date that all of the then living Advisors release the privilege of making suggestions regarding the distributions to be made from the Fund, the Fund will be disbursed in the following manner:
Combinations must total 100% in the far right column.
- Distribute to an existing fund at the Foundation which has been established for the sole benefit of the Beneficiary. Fund Name:
- Distribute all assets immediately to the Beneficiary - You may wish to have all assets distributed in a lump sum to the Beneficiary.
- Distribute to establish a new Endowment Fund with the Foundation for the benefit of Beneficiary.
8. Information Release. Donor hereby grants permission for Fund name to be shared
a. In Foundation annual donor reporting (i.e. annual report) YES NO
b. When providing grants to benefitting organization YES NO
9. How did you hear about the Catholic Foundation of Michigan?
- Donor initiated
- Referred by pastor
- Referred by a professional advisor
- Through Catholic Foundation marketing
- Through a school/parish partnership
- Other:

**Designation of Fund Advisors:** Please identify up to 2 people to serve as Advisors to the Fund.

In order for the Foundation to accept distribution instructions from Fund Advisor(s), we must have that Fund Advisors contact information and signature on file. Unless the Foundation is notified otherwise in writing, each Fund Advisor shall have the full, equal and independent privilege to direct distributions.

**Primary Advisor**

**Additional Primary Advisor**

Title	First Name	Last Name	Suffix	Title	First Name	Last Name	Suffix
Mailing Address				Mailing Address			
City/State/ZIP				City/State/ZIP			
Date of Birth				Date of birth			
Primary Phone		Second Phone		Primary Phone		Second Phone	
Email Address				Email Address			
Receive Online Fund Statements? <input type="checkbox"/> YES <input type="checkbox"/> NO				Receive Online Fund Statements? <input type="checkbox"/> YES <input type="checkbox"/> NO			

**Optional Successor Advisors:** identify up to 2 people to serve as successors to the above advisors to the fund. You may wish that, upon the death, resignation or incapacity of the last surviving Fund Advisor listed above, advisory privileges for your Fund transfer to successors who you name below. If you do not list Successor Advisors below, your final distribution plan above shall apply.

**Successor Advisor #1**

**Successor Advisor #2**

Title	First Name	Last Name	Suffix	Title	First Name	Last Name	Suffix
Mailing Address				Mailing Address			
City/State/ZIP				City/State/ZIP			
Primary Phone		Date of Birth		Primary Phone		Date of Birth	
Email Address				Email Address			

\_\_\_\_\_  
Donor Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature (Optional)

\_\_\_\_\_  
Date



Designated Organization Information

Designated Organization's Legal Name	
Mailing Address	
City/State/ZIP	
Primary Phone	Federal Tax ID # EIN:
Website	Facebook Link
Twitter Handle	LinkedIn Link

On Site Organization/Beneficiary Contact

Name	
Primary Phone	Secondary Phone
Email	Linked IN

Board Contact (if applicable)

Primary Phone	Secondary Phone
Email	Linked IN

Promotion

➤ Will this be fund be made public so that others can contribute to the fund?  YES  NO

○ If yes: Public description describing the fund (2-3 Sentences): \_\_\_\_\_  
\_\_\_\_\_