The Dayton Foundation
We help you help others.

The Regional Community Foundation

1401 S. Main St., Suite 100
Dayton, Ohio 45409

Phone: (937) 222-0410
Fax: (937) 222-0636

Website: www.dayton foundation.org

E-mail: info@dayton foundation.org

Confirmed in Compliance with National Standards for U.S. Community Foundations

Find us on

We help you help others.℠

Individual or Joint Charitable Checking Account℠ Application

The following information is for internal use only and will not be shared with any individuals or organizations outside of The Dayton Foundation.

If you prefer to speak to someone directly about opening a Charitable Checking Account, please contact Kelli Jameson at (937) 225-9934, or e-mail her at kjameson@daytonfoundation.org.

Note: asterisked items (*) are required for us to complete your application.

I Would Like to Open*

☐ an individual fund
☐ a joint fund

Primary Donor*

Title ☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Dr. ☐ Other _____

Your Name (first & last) _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

E-mail Address _____

Preferred Telephone _____

Phone Type ☐ Mobile ☐ Home ☐ Work ☐ Other _____

Date of Birth (mm/dd/yyyy) _____

Joint Fund Advisor (* required if opening a joint fund)

A joint fund advisor has full and equal privileges to direct grants, name successors to the fund and recommend additional advisors with the same privileges. If the joint advisor's address is different from your address, all fund correspondence will be sent to you as the primary donor. A joint advi-sor automatically becomes a successor to your fund in the event of your death.

Title ☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Dr. ☐ Prof. ☐ Other _____

Joint Fund Advisor's Name _____

Relationship to Donor _____

Mail-to-Street Address (if different from the primary donor) _____

City _____ State _____ Zip Code _____

E-mail Address _____

Preferred Telephone _____

Phone Type ☐ Mobile ☐ Home ☐ Work ☐ Other _____

Date of Birth (mm/dd/yyyy) _____

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Successor Advisor(s)/Final Grant Authorization

In the event of your death, you may name one or more individuals to assume responsibility for managing your fund. You may change this election at any time by contacting the Charitable Checking Account Service associate directly. Joint fund advisors are considered primary successor advisors.

Upon the passing of the last fund advisor, or if you do not name a successor advisor, any remaining balance will go to The Dayton Foundation's Emerging Community Needs Fund for the Foundation to use where community need is greatest.

Final Instructions

☐ I am naming successor advisor(s), and will fill in the information below.

☐ Please contact me about establishing a permanent endowment fund.

☐ Any remaining fund balance should be distributed by The Dayton Foundation.

Successor Advisor #1 Name (first & last) _____

Relationship to Primary Donor _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

Daytime Telephone _____

Date of Birth, if known (mm/dd/yyyy) _____

Successor Advisor #2 Name (first & last) _____

Relationship to Primary Donor _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

Daytime Telephone _____

Date of Birth, if known (mm/dd/yyyy) _____

Community Fund Group Recognition

Several Greater Dayton communities have established foundations under the umbrella of The Dayton Foundation to benefit their respective areas. Please check the appropriate box if you would like to have your fund recognized (for publication purposes only) as part of one of the following community fund groups of The Dayton Foundation:

☐ Not applicable

☐ African-American Community Fund

☐ Asian-Indian Community Fund

☐ Centerville-Washington Foundation

☐ Vandalia-Butler Foundation

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Your Suggested Fund Name and Fund Preferences*

You can select a name for your fund that means the most to you, such as your family name (e.g., "Jane and John Smith Fund," "The Smith Family Fund"). Your fund name will appear on grant checks to charities unless, when making the grant, you specifically request to remain anonymous.

Suggested Fund Name _____

☐ Make fund anonymous in publications

☐ Make fund anonymous in grant letters/checks

☐ I plan to accept outside contributions to my fund. Make my fund publicly searchable on The Dayton Foundation website for credit card and bank transfer gifts.

Your Website and Technical Contact Information

If you plan to or have a website, Facebook page or other online presence that references your fund it must be in compliance with The Dayton Foundation's Component Fund Website and Privacy Policy. Pursuant to that policy, all outside donations to your fund must be made via The Dayton Foundation website.

☐ I plan to create an online presence at a later date.

Technical Contact Name (first & last) _____

Email _____

Phone _____

Website URL _____

Facebook link _____

Please Tell Us How You Learned about the Charitable Checking Account Service

(check all that apply)

☐ Saw it on your website

☐ Received a mailing about the service

☐ Read about it in a Charitable Checking Account brochure

☐ Read about it in a Dayton Foundation newsletter or annual report

☐ Heard about it from a Dayton Foundation donor

☐ Heard about it from a Dayton Foundation staff or Governing Board member

☐ Read about it in the newspaper or in an advertisement

☐ Saw it on your Facebook, LinkedIn or Twitter page

☐ Read about it in an electronic communication (Good News Snapshot, email, etc.)

☐ Learned about it from my financial/estate advisor

If so, please tell us the advisor's name (first & last) _____

Company _____

City _____ State _____

☐ Other (please specify:) _____

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Gift Contribution Process and Next Steps

Specific instructions for making a gift to your fund, including gifts of cash or securities, will be sent to you within one to three business days.

Once your initial contribution has been received, you may begin to direct grants to charities. If no contributions are received in the twelve months from the fund establishment date, The Dayton Foundation will close the fund.

Terms and Conditions

I hereby certify that, to the best of my knowledge, all information presented in connection with this application, including contact information, is accurate, and I promptly will notify The Dayton Foundation of any changes.

I understand that any contribution to this fund, when accepted by The Dayton Foundation's Charitable Checking Account Service, represents an irrevocable contribution and is not refundable. I also understand that I may close this Charitable Checking Account at any time without penalty by submitting such a request in writing to The Dayton Foundation, 1401 S. Main Street, Suite 100, Dayton, Ohio 45409, or to info@daytonfoundation.org.

I agree to, and fully understand, this application form, and I have read the Fundraising Policy, Fund Activity Policy, and Component Fund Website and Privacy Policy and accept all terms and conditions.

Primary Donor	Date
Joint Fund Advisor (if applicable)	Date
President, The Dayton Foundation	Date

Send Your Completed Application to:

Charitable Checking Account Service
The Dayton Foundation
1401 S. Main Street, Suite 100
Dayton, Ohio 45409

or fax it to us at (937) 222-0636