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.℠

Charitable Checking Account℠ Application for Organizations

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 email her at kjameson@daytonfoundation.org.

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

Your Organization*

Organization Name _____

Type of Organization _____

☐ Not-for-profit EIN# _____

☐ For-profit

☐ Unincorporated Group

Major Purpose (e.g., Arts, Public Benefit, etc.) _____

Organization Street Address _____

City _____ State _____ Zip Code _____

Primary Contact at Organization*

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

Contact Name (first & last) _____

Position _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

Email Address _____

Business Telephone _____

Authorized Officer to Act as Advisor to Fund

Please provide the following information for the authorized officer and/or employee who may serve as an advisor to your organization's Charitable Checking Account, and, therefore, direct grants from your account.

☐ Authorized Officer is same as Primary Contact

Name (first & last) _____

Position at Organization _____

Street Address _____

City _____ State _____ Zip Code _____

Email Address _____

Phone _____

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

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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

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.

Fund Name _____

Fund Purpose for Publications _____

_____

☐ 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 donations to your fund must be made via The Dayton Foundation's website unless your organization has its own EIN number.

☐ 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

▶ MORE

☐ 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:) _____

Gift Contribution and Next Steps

Specific instructions for how to make a contribution to your fund 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 within a year following your fund's 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 have read the Fundraising Policy, Fund Activity Policy, and Component Fund Website and Privacy Policy and accept all terms and conditions.

_____ _____
Authorized Signature Date

_____
Title

_____ _____
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

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