



**THE DAYTON
FOUNDATION**

We help you help others.

*The Regional Community
Foundation*

1401 S. Main Street
Suite 100
Dayton, Ohio 45409

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

Website: www.daytonfoundation.org

E-mail: info@daytonfoundation.org

Individual or Joint Charitable Checking AccountSM Application

The following information is for our 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 Lucy Baker at (937) 225-9960 or toll free at (877) 222-0410. You also may e-mail her at lbaker@daytonfoundation.org.

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

I Would Like to Open*

- an individual account
 a joint account

Primary Donor*

Prefix Mr. Mrs. Ms. Miss Dr. Prof.

Your Name _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

E-mail Address _____

Daytime Telephone _____ Evening Telephone _____

Cell Phone _____

Date of Birth (mm/dd/yy) _____

Joint Account Advisor (* required if opening a joint account)

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

Prefix Mr. Mrs. Ms. Miss Dr. Prof.

Joint Account Advisor's Name _____

Relationship to Donor _____

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

City _____ State _____ Zip Code _____

E-mail Address _____

Daytime Telephone _____ Evening Telephone _____

Cell Phone _____

Date of Birth (mm/dd/yy) _____

Your Suggested Account Name*

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

Suggested Account Name _____



Meeting All Standards for
U.S. Community Foundations.

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We help you help others.SM

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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 account recognized (for publication purposes only) as part of one of the following community fund groups of The Dayton Foundation:

- | | |
|---|--|
| <input type="checkbox"/> Not applicable | <input type="checkbox"/> Community Foundation for Miami Township |
| <input type="checkbox"/> African-American Community Fund | <input type="checkbox"/> Huber Heights Foundation |
| <input type="checkbox"/> Asian-Indian Community Fund | <input type="checkbox"/> Oakwood Schools Foundation |
| <input type="checkbox"/> Centerville-Washington Foundation | <input type="checkbox"/> Vandalia-Butler Foundation |
| <input type="checkbox"/> Community Foundation for Kettering | |

Donor Express Registration

Most donors choose to use our secure, password-protected service, Donor Express, to obtain additional services. You don't need to wait for quarterly statements – you may obtain daily-updated account information and access your gift history at any time. You gain the convenience of directing your grantmaking online and avoiding delays in the mail.

- I would like to register for Donor Express and understand that the user name will be the primary donor e-mail address listed above. Please e-mail me my password.
- I prefer not to register for this free, online service at this time. Please mail a Grant Instruction Forms booklet to me for my Charitable Checking Account.

Account Statements

Indicate which of the following you would like to receive by mail. If you have registered for Donor Express (see previous section), please remember that you may access your account information online at any time.

Please send me:

- Annual account statements only
- Quarterly and annual account statements

Successor Advisor(s)/Final Grant Authorization

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

Upon the passing of the last account 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 (unless arrangements are made for a named endowment fund).

- I would like a member of The Dayton Foundation's Development staff to contact me about establishing a named endowment fund (optional).

I would like to name a successor advisor(s) as follows (optional):

Successor Advisor #1 Name _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

Daytime Telephone _____

Relationship to Primary Donor _____

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

Successor Advisor #2 Name _____

Mail-to Street Address _____

City _____ State _____ Zip Code _____

Daytime Telephone _____

Relationship to Primary Donor _____

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

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
- Learned about it from my financial/estate advisor

If so, please tell us the advisor's name _____

Company _____

City _____ State _____

- Read about it in the newspaper or in an advertisement
- Saw it on your Facebook, Twitter or YouTube pages
- Other (please specify:) _____

Gift Contribution Process and Next Steps

Specific instructions for making a gift to your account, including gifts of cash or securities, will be sent to you immediately. Please make checks payable to The Dayton Foundation, Inc., and note the account name or number on the check's memo line. You also can contribute online by using your credit card or by electronically transferring funds from your personal savings or checking account. Both options are easy to use, secure and available through Donor Express on our website by clicking on the Contribute to Your Account button in the left menu.

Once your initial contribution has been received, you may begin to direct grants to charities within three to five business days.

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 Guidelines for Using Your Charitable Checking Account and accept its terms and conditions.

Primary Donor Date

Joint Account Advisor (if applicable) Date

President, The Dayton Foundation Date

Send Your Completed Application to:

Charitable Checking Account Service
The Dayton Foundation
40 N. Main Street, Suite 500
Dayton, Ohio 45423
or fax it to us at (937) 222-0636