



Investment Advisor Instructions

The Investment Advisor assists the client (donor) with completion of **the Donor Application Form** and opens the corresponding investment account.

1. Line 1 of the new account title must be: **Renaissance Charitable Foundation Inc.**
2. Line 2 of the new account title typically includes the name that the donors choose for their gift fund.

Example #1:

Renaissance Charitable Foundation Inc.
John and Mary Smith Charitable Gift Fund
Suite 105
6100 West 96th Street
Indianapolis IN 46278-6005

Example #2:

Renaissance Charitable Foundation Inc.
The Smith Family Fund for the Arts
Suite 105
6100 West 96th Street
Indianapolis IN 46278-6005

3. Renaissance Charitable Foundation Inc. is the account owner. The tax identification number is **35-2129262**.
4. Margin or other borrowing in investment accounts is not permitted.
5. Send the completed **Donor Application Form, the Renaissance Charitable Foundation Investment Policy Statement** (signed by the Investment Advisor), the new investment account application and any other new investment account forms requiring signature to the Renaissance Charitable Foundation. Please clearly indicate places that require signature by Renaissance Charitable Foundation officers. Three officers of Renaissance Charitable Foundation will sign the investment account application and each will have individual authority to transact business.
6. **Immediately fax to 877-736-4624, with cover sheet, a copy of the journal entry for new account deposits/transfers.**

Please call 866-803-0389 if you need assistance.