

CORPORATE ADVISED FUND AGREEMENT



- Establish a New Fund
- Update Fund Information

Name of fund

e.g., ABC Corporate Fund

Corporation Information

Company Name

Mailing Address

City

State

Zip

Business Phone (main phone number)

Fax

Website

Referred to Silicon Valley Community Foundation by

Contact Information

Role: *See Terms and Conditions document for definitions.*

- Fund Advisor
- Primary Contact (*Please select only one primary contact on this form.*)

Name Mr. Ms.

Title

Mailing Address

City

State

Zip

Direct Phone Number

Fax

Email

DonorConnect – Online Services

- Would you like online access to your fund? Yes No
(Online access varies by the role of each contact.)



CORPORATE ADVISED FUND AGREEMENT



Corporation Contact Information

Role: Check all that apply. *(See Terms and Conditions document for definitions.)*

- Primary Contact *(Please select only one primary contact on this form.)*
- Fund Advisor
- Secondary Advisor
- Fund Representative

Name Mr. Ms.

Title

Mailing Address

City

State

Zip

Direct Phone Number

Fax

Email

DonorConnect – Online Services

Would you like online access to your fund? Yes No
(Online access varies by the role of each contact.)

Other Corporation Contact Information

Role: Check all that apply. *(See Terms and Conditions document for definitions.)*

- Primary Contact *(Please select only one primary contact on this form.)*
- Secondary Advisor
- Fund Representative

Name Mr. Ms.

Title

Mailing Address

City

State

Zip

Direct Phone Number

Fax

Email

DonorConnect – Online Services

Would you like online access to your fund? Yes No
(Online access varies by the role of each contact.)

Initial Gift to Establish a Fund

Your initial gift may be paid in the form of:

- Check \$ _____ made payable to Silicon Valley Community Foundation
- Wire* \$ _____
- Stock (Please indicate the following:)
 - Publicly Traded Privately Held*
 - Restricted # of shares _____
 - Name of Company: _____
 - We will be transferring stock via a financial firm. *(Please complete the gift transfer instructions.)*
 - We will be delivering stock certificates.*
- Other* *Please describe the gift (Real Estate, Personal Property, Testamentary, Credit Card):* _____

*Contact Silicon Valley Community Foundation at 650.450.5444.

Investment Allocation

Please indicate your investment pool selection below. You may allocate to one or more of the following investment pools. If you need additional information, please contact us at 650.450.5444.

- Long-Term Growth:** _____%
 - For funds with time horizon of seven or more years
 - 50%/25%/25% equity/alternatives/fixed income
- Social Impact:** _____%
 - For funds with time horizon of seven or more years
 - 70%/30% equity/fixed income securities
- Balanced:** _____%
 - For funds with time horizon of three to seven years
 - 40%/10%/50% equity/alternatives/fixed income
- Short-Term Pool:** _____%
 - For funds with time horizon of one to three years
 - 100% short and intermediate-term bonds
- Capital Preservation:** _____%
 - For funds with time horizon of one year or less
 - 100% money market securities and bank CDs

Total must add to 100%. Additions to the fund will be invested in the same percentages.

Anonymity and Publicity

The community foundation includes information about fund advisors, grantees and funds in our e-newsletters, magazine, website and other printed and online materials. If you would like anonymity, please indicate below.

- Do not list the corporation on donor or fund advisor listings.
- Do not include the corporate fund name on fund listings.
- We are willing to be featured in the community foundation's print and online publications.
- We are willing to be interviewed for media stories.

Grantmaking

Corporate Advised Fund Custom Grant Letter

Each grant made from a corporate advised fund is mailed with a grant letter. This letter has a header indicating the fund name, unless anonymity is requested. A fund advisor or secondary advisor may select anonymity on a grant-by-grant basis.

- Please make all grants from the fund anonymous.

Contact Options by Nonprofits

An organization that has received grants from the fund may wish to send information to your corporation. Please indicate your contact preference for the custom grant letter:

- Provide our corporation's address.
- Do not provide our corporation's address.

Mail the community foundation receives for the corporate advised fund will not be forwarded.



CORPORATE ADVISED FUND AGREEMENT

Acknowledgement & Signatures

We acknowledge that we have read Silicon Valley Community Foundation's Fund Terms and Conditions and Corporate Support Fees documents and agree to the terms, fees and conditions described therein. We understand any contribution, once accepted by the community foundation's board of directors, represents an irrevocable contribution to the community foundation. The community foundation's board of directors has variance power under IRS regulations, and this gift is not refundable to this corporation.

We hereby certify, to the best of our knowledge, all information presented in connection with this form is accurate, and we will notify the community foundation promptly of any changes.

Corporation Contact Signature *(This should be the fund advisor.)*

Print Name

Date

Corporation Contact Signature

Print Name

Date

Other Corporation Contact Signature

Print Name

Date

Silicon Valley Community Foundation Signature

Authorized Signature

Title

Print Name

Date

Please mail this form to:

Silicon Valley Community Foundation

2440 West El Camino Real, Suite 300

Mountain View, CA 94040-1498

Phone: 650.450.5400 | Fax: 650.450.5401 | www.siliconvalleycf.org

Please contact the development department at donate@siliconvalleycf.org or call 650.450.5444 if you have questions.

Special Instructions:
