

Please print in uppercase using black or dark blue ink. This form may be completed by any Grant Advisor. Sign, and then fax, email, or mail

Windrose Advisors
800 South St, Suite 600
Waltham, MA 02453

Phone:
800-605-7917

Fax:
877-222-1829

Email:
windrose@reninc.com

Windrose Advisors Donor Advised Fund Name

Windrose Advisors Donor Advised Fund Number

You may find your Windrose Advisors Donor Advised Fund Number on the home page when you log in to your Windrose Advisors Donor Advised Fund.

Please tell us the name, SSN, and contact information for the Grant Advisor completing this form.

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	suffix	
<input type="text"/>	<input type="text"/>	
Social Security Number	Daytime Telephone Number	Email Address
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>

What would you like to update? Check all that apply.

Actions with an asterisk (*) may also be updated online by logging in to your Windrose Advisors DAF at <https://windroseadvisor.donorfirstx.com/>

- Change Windrose Advisors Donor Advised Fund Name see Section 1
- Name Change see Section 2
- Update Contact Information and Communication* Preference see Section 3
- Add or Update Successor Grant Advisor(s) or Charitable Beneficiary(ies)* see Section 4
- Change Access to your Advisor see Section 5
- Recommend Investment Reallocation* see Section 6

1. CHANGE DONOR ADVISED FUND NAME

*To update the name of your Donor Advised Fund, enter the new name below.

New Donor Advised Fund Name

Questions or need assistance? Call 800-605-7917.

2. NAME CHANGE FOR CURRENT PERSON

Please tell us the current name we have on record, and the new name you would like us to use. Please include a copy of the official name change document.

*Name as it currently appears in Windrose Advisors Donor Advised Fund records:

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	suffix	
<input type="text"/>	<input type="text"/>	

***New Name**

Title	First Name	Middle Initial
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	suffix	
<input type="text"/>	<input type="text"/>	

In order for Windrose Advisors Donor Advised Fund to accept a name change, we must receive a copy of the official name change document. Please mail that to us along with this completed form.

3. UPDATE CONTACT INFORMATION AND COMMUNICATION PREFERENCE

Contact Update 1: For whom are you updating information?

Name (First, Middle, Last)

Indicate what type of information you are changing and then complete the relevant items below:

- Mailing Address
 Daytime Telephone
 Evening Telephone
 Email Address
 Send statements electronically
 Mobile Phone

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone Number

Mobile Phone Number

Email Address

Contact Update 2: For whom are you updating information?

Name (First, Middle, Last)

Indicate what type of information you are changing and then complete the relevant items below:

- Mailing Address
 Daytime Telephone
 Evening Telephone
 Email Address
 Send statements electronically
 Mobile Phone

Mailing Address

City

State

Zip Code

Country of Address

Country of Residence

Country of Citizenship

Daytime Telephone Number

Evening Telephone Number

Mobile Phone Number

Email Address

4. ADD OR UPDATE SUCCESSOR GRANT ADVISOR(S) OR CHARITABLE BENEFICIARY(IES)

Your succession plan specifies how your Donor Advised Fund assets will be handled upon your death. Please copy this page to add or update additional successors.

4A. SUCCESSOR GRANT ADVISOR(S)

Check One: Add Remove Update

Title **Name of Successor Grant Advisor #1**

Social Security Number **Date of Birth** / / **Relationship to Original Donor**

Mailing Address

City **State** **Zip Code**

Country of Address **Country of Residence** **Country of Citizenship**

Daytime Telephone Number **Evening Telephone Number** **Email Address**

Check One: Add Remove Update

Title **Name of Successor Grant Advisor #2**

Social Security Number **Date of Birth** / / **Relationship to Original Donor**

Mailing Address

City **State** **Zip Code**

Country of Address **Country of Residence** **Country of Citizenship**

Daytime Telephone Number **Evening Telephone Number** **Email Address**

Grant Advisors must be 18 or older to provide grant or investment recommendations. If a Donor Advised Fund succession plan includes successor Grant Advisors, and no successor has reached the age of 18 at the time of the death, incapacitation or resignation of the last surviving Grant Advisor, Windrose Advisors will proceed as follows:

- If no successor is at least age 15, Windrose Advisors will make charitable grants from the Donor Advised Fund until the oldest successor Grant Advisor reaches the age of 18.
- If at least one successor is age 15 or older, Windrose Advisors will maintain the Donor Advised Fund until the oldest successor Grant Advisor reaches the age of 18.

You may name 1) individual successor grant advisors to succeed you with full grant advisors rights and privileges, 2) recommend charitable organizations as beneficiaries of the Windrose Advisors DAF balance in equal amounts, or 3) recommend a combination of successors and beneficiaries. If you recommend a combination, 50% of the Windrose Advisors DAF balance will remain in the Fund for your successors. The remainder will be distributed to the charitable organizations in equal amounts. Successors do not have access to your Windrose Advisors DAF until the death, incapacitation or resignation of all current Grant Advisors associated with your Donor Advised Fund.

4. ADD OR UPDATE SUCCESSOR GRANT ADVISOR(S)[†] OR CHARITABLE BENEFICIARY(IES) (CONTINUED)

4B. RECOMMEND UPDATES TO CHARITABLE BENEFICIARY(IES)

Check One: Add Remove Update

Name of Charitable Beneficiary #1

Mailing Address

City

State

Zip Code

Daytime Telephone Number

Employer Identification Number

Email Address (if available)

Check One: Add Remove Update

Name of Charitable Beneficiary #2

Mailing Address

City

State

Zip Code

Daytime Telephone Number

Employer Identification Number

Email Address (if available)

You may name charitable organizations as beneficiaries of the Windrose Advisors DAF balance in equal amounts. If you recommend a combination of successors and beneficiaries, 50% of the Windrose Advisors DAF balance will remain in the Fund for your successors. The remainder will be distributed to the approved charitable organizations in equal amounts.

5. ADD OR UPDATE YOUR ADVISOR INFORMATION

By providing Windrose Advisors with the name of your current Advisor, you are authorizing Windrose Advisors to share with such Advisor, any information relating to the Windrose Advisors DAF.

Add Advisor Remove Advisor

First Name

Last Name

City

State

Add Advisor

Remove Advisor

First Name

Last Name

City

State

You may use this section to grant a Advisor access to your Windrose Advisors DAF, or remove an Advisor who currently has access to your Windrose Advisors DAF.

6. SIGNATURE TO AUTHORIZE UPDATES

I acknowledge that I have read the Windrose Advisors DAF Program Guidelines: Program Circular and agree to the terms set forth there in. All recommendations are subject to the full and exclusive legal authority, control and discretion of Renaissance Charitable Foundation Inc.

I hereby certify that, to the best of my knowledge, all information presented in connection with this form is accurate, and I will promptly notify Windrose Advisors DAF in writing of any changes.

Signature

Today's Date (mm/dd/yyyy)

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	2	0	<input type="text"/>	<input type="text"/>
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MAIL, FAX OR EMAIL THIS FORM TO:**Windrose Advisors**

800 South St, Suite 600
Waltham, MA 02453

Phone: 617-421-1750

Fax: 877-222-1829

Email us at windrose@reninc.com

Questions or Need Assistance? Please call Windrose Advisors Donor Advised Fund at **800-605-7917**.