

Donor Application

Complete this form to open a Charitable Investment Account



01_Account holder information

Account holders have equal access and privileges to the account. You can have up to 2 account holders.

Account holder #1 _____

Title First name Last name

Preferred Name

Date of birth Primary phone number Secondary phone number

Primary email address Secondary email address

Preferred method of contact

Address City Province

Postal code Country

Account holder #2 _____

Title First name Last name

Preferred Name Relationship to Account holder #1

Date of birth Primary phone number Secondary phone number

Primary email address Secondary email address

Preferred method of contact

Address City Province

Postal code Country

Same address as Account holder #1

If you have chosen to have more than one account holder, please choose whether you prefer to have shared or separate login access to your Impact Account.

One shared login

Two separate logins

02_Fund name

If you'd like, you can add a fund name for your account (for example, Lam Family Fund). You can choose to recommend grants to charities under this name, your personal name, or give anonymously if you prefer.

Fund name



03 Account permissions and access

Name the individuals who can access or request information about your Charitable Investment Account and Impact Account.

| | | |
|---|---|--|
| <p>Full Access</p> <p>These individuals can act on your behalf. They can make recommendations to sell assets in your Charitable Investment Account and transfer funds to your Impact Account, recommend grants to charities, or modify account information.</p> <p>Full access is retained in the event of your passing or incapacitation.</p> | <p>Informed Access</p> <p>These individuals can request information about your account(s), including account balances, recent transactions, and tax receipts.</p> <p>They <i>cannot</i> make recommendations about assets or make account changes.</p> | <p>Successor</p> <p>These individuals gain full access to your account(s) and charitable assets upon your passing or incapacitation.</p> <p>They can also have full or informed access.</p> |
|---|---|--|

Individual 1

Level of access:

- Full access
- Informed access
- Successor

First Name

Last Name

Preferred name

Date of Birth

Primary phone number Secondary phone number

Primary email address

Secondary email address

Relationship to account holder(s)

Preferred method of contact

Address

City Province

Postal code Country

Individual 2

Level of access:

- Full access
- Informed access
- Successor

First Name

Last Name

Preferred name

Date of Birth

Primary phone number Secondary phone number

Primary email address

Secondary email address

Relationship to account holder(s)

Preferred method of contact

Address

City Province

Postal code Country

Individual 3

Level of access:

- Full access
- Informed access
- Successor

First Name

Last Name

Preferred name

Date of Birth

Primary phone number Secondary phone number

Primary email address

Secondary email address

Relationship to account holder(s)

Preferred method of contact

Address

City Province

Postal code Country

04_Succession plan

A Succession Plan outlines your charitable wishes and specifies how you would like your account to be administered in the event of your passing or incapacitation.

Please check the box below if you'd like to prepare a Succession Plan. Our Philanthropic Advisory Services team will contact you to help you create your plan.

Yes, I would like to prepare a succession plan.

05_Agreement and signature

By signing below, you agree that you:

- Have received, read, and understood this Donor Application form.
- Understand that any donations to—or transfers into—your Charitable Investment Account are irrevocable donations to CHIMP: Charitable Impact Foundation (Canada).
- Acknowledge the risks associated with investments and understand that investments can decrease in value.
- Understand that any gains or losses associated with your Charitable Investment Account will directly contribute to the growth or reduction of the account, which impacts your ability to recommend grants from your Impact Account .
- Understand that the fees charged by your financial advisor are deducted from the balance of your Charitable Investment Account (fees do not impact the value of the tax receipt).

Account holder #1

Account holder name

Date

Signature

Account holder #2

Account holder name

Date

Signature

06_Next steps

- Open an Impact Account at charitableimpact.com.
- Connect with your financial advisor to make a donation.
- Connect with Philanthropic Advisory Services to recommend a grant to charity, discuss charitable giving goals, and/or create a Succession Plan.

Philanthropic Advisory Services

+1 877 531 0580

philanthropy@charitableimpact.com