

Donor Application



Complete this form to open a Charitable Investment Account

01. Account holder information

Charitable Investment Account (CIA) holders have equal access and privileges to the account. You can have up to two account holders.

Account holder #1

Title	First name	Last name	Preferred Name	Pronouns
<input type="text"/>			<input type="text"/>	<input type="text"/>
Date of birth	Phone number	Email address	Preferred method of contact	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address	City	Province	Postal code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Account holder #2

Title	First name	Last name	Preferred Name	Pronouns
<input type="text"/>			<input type="text"/>	<input type="text"/>
Date of birth	Relationship to Account holder #1	Phone number	Email address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Preferred method of contact	<input type="radio"/> Same address as Account holder #1			
<input type="text"/>				
Address	City	Province	Postal code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

If you have two Charitable Investment Account holders, confirm if you would like to make account holder #2 an admin of the associated Impact Account. Impact Account admins can access the account themselves to add money, send gifts, and schedule deposits and gifts—just like the account owner. [Learn more about Impact Account admins.](#)

Make account holder #2 an Impact Account admin

02. Impact Account name

You can use your first and last name, or give your Impact Account a specific name (for example, Lam Family Fund).

When you send gifts, you'll have the option to share your Impact Account name, your Impact Account name and contact information, or give anonymously.

Impact Account name



03. Account permissions and access

Name the individuals who can access or request information about your Charitable Investment Account and Impact Account. Account holder #1 (and account holder #2, if applicable) do not need to be named because they already have full account access.

Note: To name a successor, please complete a Succession Plan separately from this form. 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.

Full access

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, and modify account information. Full access is retained in the event of your passing or incapacitation.

Informed access

These individuals can request information about your accounts, including account balances, recent transactions, and tax receipts. They cannot make recommendations about assets, recommend grants to charities, or make account changes.

Individual 1

Level of access: Full access Informed access

First Name	Last Name	Preferred name	Pronouns	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone number	Email address	Relationship to account holder(s)	Preferred method of contact	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address	City	Province/State	Postal/ZIP code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Individual 2

Level of access: Full access Informed access

First Name	Last Name	Preferred name	Pronouns	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone number	Email address	Relationship to account holder(s)	Preferred method of contact	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address	City	Province/State	Postal/ZIP code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Individual 3

Level of access: Full access Informed access

First Name	Last Name	Preferred name	Pronouns	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone number	Email address	Relationship to account holder(s)	Preferred method of contact	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address	City	Province/State	Postal/ZIP code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

04. Quarterly CIA Statements

Charitable Investment Account holders receive quarterly statements that provide a summary of their account activity from the previous quarter (e.g. donations, grants, quarterly fees). These statements are sent electronically to the account holder's email(s) on file.

If you prefer to receive print copies of the statement by mail, please check the box below.

- I would like to receive my quarterly statements by mail.

05. Agreement and signatures

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

If you haven't done so already, please complete the following:

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

Philanthropic Advisory Services

+1 877 531 0580

philanthropy@charitableimpact.com