



PRESBYTERIAN CHURCH IN AMERICA FOUNDATION, INC.
1700 NORTH BROWN ROAD, SUITE 103
LAWRENCEVILLE, GEORGIA 30043

How to Establish an Advise & Consult Fund®

The PCAF's Advise & Consult Fund is a donor-advised fund with zero fees. 100% of the account balance is available for support of your local church or favorite Christian ministry. To establish an Advise & Consult Fund with the PCAF, read the steps outlined below and complete the agreement following this page. However, please don't hesitate to contact us first if you have any questions or want to discuss the Advise & Consult Fund before completing an agreement and establishing a fund.

1. Establish a name for the Advise & Consult Fund and enter it in Section one of the agreement. For example, many donors choose to name the fund after their family as in the "Sample Family Advise & Consult Fund". Oftentimes, husbands and wives choose to use their first and last names to name their fund as in the "John & Mary Sample Advise & Consult Fund". The fund's name will appear in all correspondence mailed to grant recipients as a result of grant distributions recommended by the authorized individuals unless anonymity is requested. If a name is not specified, the Donor's name will be used as the fund's name.
2. Complete the Donor Information section (page 2) of the agreement. Each individual authorized to make recommendations regarding grant distributions of the amount donated must sign the agreement.
3. Complete Schedule A of the agreement (page 3). Schedule A is simply a list of the property transferred as the **initial** contribution to the fund. For example, if you establish an Advise & Consult Fund by writing a check, list "Check #123 for \$1,000". Or, if the fund is established by transferring appreciated assets like stock, bonds, or mutual funds, list "100 shares of XYZ".
4. Sign and date the "Donor Acknowledgement" on page 4 of the agreement. Again, each individual authorized to make recommendations regarding grant distributions of the amount donated must sign the acknowledgement.
5. Mail, fax, or email the completed Advise & Consult Fund agreement to the PCAF.

PCA Foundation, Inc.
1700 North Brown Road, Suite 103
Lawrenceville, GA 30043

Toll Free: 800-700-3221
Fax: 678-825-1041
Email: pcaf@pcanet.org

6. If the initial contribution is by check, it can be mailed along with the signed agreement. Checks should be made payable to the PCA Foundation, Inc. Refer to the "[Gifting Instructions](#)" page of our website for instructions on initiating contributions from your bank/savings account via ACH.
7. If you plan to gift appreciated assets as the initial contribution, please call us to obtain transfer instructions for your broker.
8. Once the Advise & Consult Fund is established and the account number known, visit the PCAF's website and follow the link at the top of the homepage to register for a Donor Portal user account.

Note: Upon receipt of the initial contribution, we will execute the Advise & Consult Fund agreement and mail a copy to you for your records. A gift receipt will be provided for your charitable contribution.



PRESBYTERIAN CHURCH IN AMERICA FOUNDATION, INC.
1700 NORTH BROWN ROAD, SUITE 103
LAWRENCEVILLE, GEORGIA 30043

ADVISE & CONSULT FUND® AGREEMENT

Dear Sirs:

Delivery is made herewith and by this letter of even date of the property listed on Schedule A attached hereto and made a part hereof by this reference. Delivery of such property constitutes an irrevocable gift of the same to Presbyterian Church in America Foundation, Inc. (hereinafter the "Foundation"). Upon the Foundation's acceptance of this gift and of the following terms and conditions:

1. A fund shall be established in the Foundation which shall be known as the *
_____ **Advise & Consult Fund** (hereinafter the "Fund"). This Fund will be a donor-advised fund of the Foundation. The Foundation may receive additional irrevocable gifts from time to time from the undersigned and from any other source to be added to the Fund, all subject to the provisions hereof.

2. The Foundation shall have all powers necessary, or, in its sole discretion, desirable, to carry out the purposes of the Fund, including, but not limited to, the power to retain, invest and reinvest the Fund in any manner it may see fit without being subject to any investment restrictions, statutory or judicial, which would otherwise be applicable to it as a fiduciary; and the power to commingle the assets of the Fund with those of other funds for investment purposes. No person dealing with the Foundation shall be required to inquire into its authority to act.

3. The principal and income of the Fund shall be distributed only to organizations of the type to which an individual taxpayer may make deductible charitable contributions, gifts and bequests under the income, gift and estate tax provisions of the Internal Revenue Code of 1986, as amended (the "Code"). It is intended by the foregoing that at the time a distribution is made from the Fund, the organization which is the distributee must be an organization described in Sections 170(c), 2055 and 2522 of the Code, and classified as an organization under Section 509(a)(1), 509(a)(2) or 509(a)(3) of the Code other than (a) a private foundation or (b) an impermissible distributee in accordance with the policies of the Foundation, as they may be modified from time to time. Furthermore, the undersigned (also referred to as "donor(s)") acknowledge(s) and agree(s) that 1) distributions from the Fund shall only be made to those organizations described above which hold to, or whose purposes further, in the sole discretion of the Foundation, doctrines and beliefs which further the exempt purposes of the Foundation as described in the Articles of Incorporation and Bylaws of the Foundation, as amended from time to time, and 2) distributions from the Fund are only permitted to benefit the organizations receiving the distributions, not the donors to the Fund, advisors (also referred to as "designee" in paragraph 4), or members of any donor's or advisor's family, in accordance with the policies of the Foundation, as they may be modified from time to time.

*Name of Donor will be used unless otherwise specified.

4. Distributions from the Fund of principal and/or income shall be made at such time or times and in such amount or amounts as may be determined solely by the Foundation, and shall be made to such organizations of the type described in Paragraph 3 above as may be designated by the Foundation; provided, however, that the undersigned or his designee may, from time to time, submit to the Foundation the names of organizations to which it is recommended by the undersigned or such designee that distributions be made, which organizations shall not be other than those described in Paragraph 3. Such recommendations shall be solely advisory, and shall apply solely to the amounts actually contributed by the undersigned, and not to any capital gains thereto or income thereon; and the Foundation may accept or reject such recommendations applying reasonable standards and guidelines with regard thereto. The Foundation shall independently investigate such recommended distributees to the extent necessary or desirable in the Foundation's sole discretion, prior to its decision to accept or reject such recommendations.

The property described in Schedule A has a value in excess of \$1,000, and the minimum value of each additional contribution of property to the Fund shall be \$1,000. These amounts may be changed from time to time, and exceptions may be made, by the Foundation in its sole discretion. The minimum amount of any distribution from the Fund shall be \$250, as changed from time to time by the Foundation in its sole discretion.

Kindly indicate below the Foundation's acceptance of this gift and of the foregoing terms and conditions.

Very truly yours,

DONOR INFORMATION

<p><i>First Name, Middle Initial, Last Name:</i> _____</p> <p><i>Street Address:</i> _____</p> <p><i>City, State, Zip:</i> _____</p> <p><i>Email Address:</i> _____</p> <p><i>Phone:</i> _____</p> <p><i>Date of Birth:</i> _____</p> <p>Signature: _____</p> <p><i>Date:</i> _____</p>	<p><i>First Name, Middle Initial, Last Name:</i> _____</p> <p><i>Street Address:</i> _____</p> <p><i>City, State, Zip:</i> _____</p> <p><i>Email Address:</i> _____</p> <p><i>Phone:</i> _____</p> <p><i>Date of Birth:</i> _____</p> <p>Signature: _____</p> <p><i>Date:</i> _____</p>
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PCA FOUNDATION ACCEPTANCE

Receipt of the above described property is hereby acknowledged and accepted, and the terms and conditions described herein are hereby accepted, this _____ day of _____, 20____.

Presbyterian Church in America Foundation, Inc.

By: _____ ***Randel N. Stair, President*** Attest: _____ ***Quincy M. Bailey, Assistant Secretary***

SCHEDULE "A"

PROPERTY TRANSFERRED

On this page, list your contribution(s)
(i.e. "Check # 555 for \$xxxxx.xx", or "150 Shares of XYZ Stock")

DONOR ACKNOWLEDGMENT

The undersigned hereby acknowledges and agrees that, under the terms of the _____ Advise & Consult Fund Agreement (the "Agreement") and the Internal Revenue Service's private letter ruling governing the Foundation's Advise and Consult Fund program, the undersigned may make suggestions as to the ultimate distribution of the amount donated by the undersigned under such Agreement, excluding income thereon and capital gains thereto.

This _____ day of _____, 20_____.

Signature: _____

First Name, Middle
Initial, Last Name:

Signature: _____

First Name, Middle
Initial, Last Name:
