



DAF Gift Form

This Gift Form should be used to provide ZLC Foundation ("the Foundation") with formal instructions for gift to our organization. Please complete the required information depending on the type of gift being made:

- Gift to your own Donor Advised Fund ("DAF")
- Gift to a third-party's Fund at the Foundation

For donations of life insurance, please consult with your Advisor.

DONOR DETAILS

Title (Mr., Mrs., Miss., Ms., Dr., Corporation):		Full Name (Including initials):	
Street Address:	City:	Province:	Postal Code:
Telephone Number:	Email Address:	Business Number (If applicable):	
Residency (If different than mailing address):			

Provide a photocopy of a valid Passport or Driver's License for signature verification unless the donor is verified by the Investment Advisor OR if a business, provide a copy of the Corporate Resolution, Articles of Incorporation and Business Number.

GIFT TO A DAF

I direct this gift to: _____ (the "DAF").
 _____ Fund Name

I understand that this gift to this DAF will constitute a charitable gift to the Foundation and all the funds in the DAF will be the property of the Foundation and disbursed at the discretion of the Foundation. The DAF is subject to terms and conditions of the ZLC DAF Gift Agreement with the Foundation and the ZLC Foundation DAF Policies and Guidelines.

Please also carefully review the Foundation's DAF Policies and Guidelines at www.zlc.net/daf regarding the Foundation's Donor Advised Funds Program, which the Foundation may replace, supplement or amend from time to time in its discretion (as replace, supplemented and/or amended, the "DAF Policies").

GIFT DETAILS

See the DAF Policies regarding the initial gift required to establish a DAF at the Foundation, including the circumstances in which approval from the Foundation's Gift Acceptance Committee must be obtained prior to making the gift.

A cheque in the amount of \$

(Cheques should be made out to "ZLC Foundation" with the name of the Fund in the Memo line.)

Wire or electronic transfer for \$

Flow-through shares with a value of approximately \$

Publicly traded securities or mutual fund shares with a value of approximately \$

Assets transferred from another Canadian registered charity with a value of approximately \$

Deferred contribution in accordance with the DAF Policies. Describe the nature and amount of the gift (e.g. testamentary gift, proceeds from life insurance policy) and confirm that Foundation approval has been obtained where required.

(Please see DAF Policies for requirements for deferred contributions to establish a DAF)

Other, in accordance with the DAF Policies. Describe the nature and amount of the gift and confirm that Foundation approval has been obtained where required.

PRIVACY

I acknowledge that the Foundation may use my information to process gifts, administer delivery of charitable services, establish, maintain and manage our relationship, including set up and management of the DAF and maintenance of an accurate record of my involvement; provide information regarding the operations of the DAF and offer further opportunities to give; verify my identity and protect against fraud; satisfy regulatory obligations and other legal requirements; and to create statistics about the Foundation's operations and understand the current and future needs and preferences of donors.

I further acknowledge that, in administering its charitable services, the Foundation may provide my personal information to other persons: where the other parties are grant recipients and I have consented below to be recognized; where the other parties are the Foundation's third-party service providers, suppliers or agents who assist the Foundation in providing their services; and where they are required or permitted to do so by law. The third-party service providers the Foundation engages with are asked to respect their privacy practices and do not use any personal information for purposes other than to carry out their instructions or provide services for them. To find out more about the Foundation's privacy practices, please refer to the ZLC Foundation Privacy Policy.

All grants made to charities from the Foundation are accompanied by a letter indicating the gifts are made from the donor. These grants may be disbursed with anonymity or with full disclosure of the donor's name and address in the letter. Please indicate your preference. (Donors to their own personal ZLC Foundation DAF need not complete this information.)

I prefer to be anonymous.

I prefer to be identified personally to the recipient charity or ZLC Foundation, including my name and address.

SIGNATURE

I understand that this gift represents an irrevocable gift to the ZLC Foundation, a registered charity, and is not refundable to me for any reason.

Donor Name:

Donor Signature:

Date:

Contact us

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info@zlc.net | 604.688.7208

