



American Heart Association®

# Donor Advised Fund

Investment Advisor **INSTRUCTIONS**

The Investment Advisor assists the client (donor) with completion of the **Donor Application Form** and opens the corresponding investment account. The American Heart Association Donor Advised Fund is a donor advised fund program sponsored and managed by Renaissance Charitable Foundation (RCF), an independent public charity dedicated to helping individuals effectively reach their philanthropic goals.

1. **Line 1** of the new account title must be: **Renaissance Charitable Foundation Inc.**

**EXAMPLE #1:**

Renaissance Charitable Foundation Inc.  
John and Mary Smith Charitable Gift Fund  
8910 Purdue Rd, Suite 555  
Indianapolis, IN 46268

**EXAMPLE #2:**

Renaissance Charitable Foundation Inc.  
The Smith Family Heart Research Fund  
8910 Purdue Rd, Suite 555  
Indianapolis, IN 46268

2. **Line 2** of the new account title typically includes the name that the donors choose for their gift fund.
3. Renaissance Charitable Foundation Inc. is the account owner. The tax identification number is **35-2129262**.
4. Margin or other borrowing in investment accounts is not permitted.
5. Send the completed **Donor Application Form**, the **American Heart Association Donor Advised Fund Program Investment Policy Statement** (signed by the Investment Advisor), the **New Investment Account Application** and any other new investment account forms requiring signature to the Renaissance Charitable Foundation. Please clearly indicate places that require signature by Renaissance Charitable Foundation officers. Three officers of Renaissance Charitable Foundation will sign the investment account application and each will have individual authority to transact business.
6. Immediately fax to **877-222-1829, with cover sheet, a copy of the journal entry for new account deposits/transfers.**

Please call **(800) 584-8946** if you need assistance.

**American Heart Association  
Donor Advised Fund Program**  
8910 Purdue Road, Suite 555  
Indianapolis, IN 46268

Call: 800-584-8946  
Fax: 877-222-1829  
**Email: [heart@reninc.com](mailto:heart@reninc.com)**

or visit our website at:  
**[www.heart.org/donoradvisedfund](http://www.heart.org/donoradvisedfund)**