

DONOR APPLICATION

Complete this form, to establish an Legatus Donor-Advised Fund powered by Knights of Columbus Charitable Fund "Legatus DAF". If you need assistance, please contact Dennis Gerber, Knights of Columbus Charitable Fund, at Legatus-DAF@kofc.org or (475) 227-6701.

1. Donor-Advised Fund Name

Choose a name for your donor-advised fund. You may name it for yourself, for your family ("The Brown Family Charitable Fund"), in memory of someone, or for a particular charitable purpose ("The Annual Seminarian Fund").

Donor Advised Fund Name

2. Do you wish to place any restrictions on your fund? Yes No

If yes, please describe:

3. Initial Contribution Amount

\$

Initial Contribution Amount

4. Contribution Transfer Instructions

Check

Please mail your check to:

Knights of Columbus Charitable Fund c/o Legatus DAF

One Columbus Plz., 19th Fl.

New Haven, CT 06510 Tax ID#: 81-5466677

Wire Transfer

Cash contributions may be made via wire transfer. Please follow these instructions when making a wire transfer:

Bank: Bank of New York Mellon Corporation

Bank Address: 500 Ross St. | Pittsburgh, PA 15262

Name on Account: Knights of Columbus Charitable Fund, Inc.

ABA: 021000018 Account Number: 8901500399

Securities

Contributions may be made in the form of securities. If you wish to contribute to your DAF in this manner, please follow these instructions:

DTC: 0443 | Pershing, LLC

For Credit to Account #: N7M002259

Client Account Name: Knights of Columbus Charitable Fund, Inc.

_____	_____	_____
Name of Stock	Trading Symbol	# of Shares
_____	_____	_____
Name of Stock	Trading Symbol	# of Shares
_____	_____	_____
Name of Stock	Trading Symbol	# of Shares

5. How Would You Like To Receive Information From Legatus DAF?

Go Green! View statements and receive correspondence online

Receive correspondence via mail

6. Primary Advisor

Identify the Primary Advisor for the fund (typically, this is also the Primary Donor to the fund).

_____	_____	_____	
Title	First Name, MI, Last Name	Date of Birth	
_____	_____	_____	
Street Address	City	State	Zip
_____	_____	_____	
Email	Primary Telephone #	_____	

7. Joint Advisor

You may name an individual (such as a spouse, family member, friend or other) as Joint Advisor to your fund who also has the authority to recommend grants and investment allocations, view fund information, and name successors. They will assume the role of Primary Advisor to the account in the event of the death or incapacitation of the Primary Advisor.

Would you like to name a Joint Advisor to your fund at this time?

Yes No

Title First Name, MI, Last Name Date of Birth

Same address as Primary Advisor

Street Address City State Zip

Email Primary Telephone #

8. Secondary Advisor(s)

You may name Secondary Advisors to your fund who can recommend grants. As the Primary Advisor, all Secondary Advisor recommendations are submitted to you for approval prior to being submitted for grant approval. Secondary Advisors will not succeed the Primary and Joint Advisors unless they are named as Successors in Section 6A. To indicate additional Secondary Advisors, you may attach a separate sheet.

Would you like to name a Secondary Advisors to your fund at this time?

Yes No

Title First Name, MI, Last Name Date of Birth

Same address as Primary Advisor

Street Address City State Zip

Email Primary Telephone #

9. Financial Advisor

You may name a Financial Advisor to your fund if you wish to do so. A Financial Advisor may be given read-only account access or the authority to recommend investment allocations and recommend grants on the Primary/Joint Advisor's behalf.

Financial Advisor Name	Financial Institution		
Street Address	City	State	Zip
Email	Primary Telephone #		

10. Succession Plan

You may name an individual(s) as successor advisor(s) to continue your charitable legacy in the event of death or incapacity of both Primary and Joint Advisors and/or you may elect to name specific charities as the Charitable Beneficiaries of the fund. These recommendations may be changed at any time. To indicate additional Successors or Charitable Beneficiaries please attach their information on a separate page.

If you do not select a succession plan, the balance of your fund will be granted to Legatus. Once your fund is established you can amend your succession plan through our secure donor portal at any time. To indicate additional Successor Advisors or Charities, you may attach a separate sheet.

A. I wish to name a Successor Advisors

Create new separate fund(s), and divide assets equally among Successor(s).

1:

Title	First Name, MI, Last Name	Date of Birth	
Street Address	City	State	Zip
Email	Primary Telephone #		

2:

Title	First Name, MI, Last Name	Date of Birth	
Street Address	City	State	Zip
Email	Primary Telephone #		

B. I wish to elect charities as the Charitable Beneficiaries of the funds

When you pass away, if any of the charities listed below no longer exists, Knights of Columbus Charitable Fund will do our best to find a comparable replacement with a similar mission.

Distribute all of the remaining assets in the fund to the following charity(ies)

1: _____
 Charity Name Annual % (Option 2 only)

Street Address City State Zip

Email Primary Telephone #

2: _____
 Charity Name Annual % (Option 2 only)

Street Address City State Zip

Email Primary Telephone #

11. Investment Allocation

Please recommend how to allocate your contributions by choosing Option 1, a model portfolio created by Knights of Columbus Asset Advisors (KCAA), or choose Option 2 and create your own portfolio.

To learn more about KCAA mutual funds and portfolios please visit kofcassetadvisors.org

Option 1: KCAA Model Portfolios. (The following portfolios were prepared by Knights of Columbus Asset Advisors)

- Conservative
- Moderately Conservative
- Moderate
- Moderately Aggressive
- Aggressive

Option 2: Create your own Portfolio

Percentage of total, combined must equal 100%:

- Limited Duration Bond: _____ %
- Core Bond: _____ %
- Large Cap Growth: _____ %
- Large Cap Value: _____ %
- Small Cap Equity: _____ %
- International Equity: _____ %

12. Acknowledgment of Terms

I/We understand that the Legatus Donor-Advised Fund is a co-branded DAF offering through Knights of Columbus Charitable Fund and that my/our gifts of property are irrevocable, nonrefundable and unconditional contributions, in accordance with the terms set forth in this New Account Form and the Additional Terms and Conditions, when received and accepted by Knights of Columbus Charitable Fund, and that Knights of Columbus Charitable Fund, retains exclusive legal control over contributed assets. I/We acknowledge that I/we have read the Knights of Columbus Charitable Fund, Additional Terms and Conditions, and Program Guide and I/we agree to be bound thereby. I/We certify that, to the best of my/our knowledge, all information in connection with this application is accurate, and I/we will notify Knights of Columbus Charitable Fund, in writing of any changes. Further, I/we understand that the advisory privileges described herein are solely advisory in nature and that KCCF has the final express authority to supervise the operations of your fund and, under the variance power of KCCF's Board of Directors, to review all grant and investment recommendations to ensure they accord with KCCF's religious purposes.

Primary Advisor Signature

Date

Primary Advisor Signature

Date

13. Return this completed form by mail or email to:

Knights of Columbus Charitable Fund c/o Legatus DAF
One Columbus Plz., 19th Fl.
New Haven, CT 06510

Legatus-DAF@kofc.org

Knights of Columbus Charitable Fund is an independent, nonprofit, public charity with a donor-advised fund program. Various entities affiliated with Knights of Columbus provide certain investment management and administrative services to Knights of Columbus Charitable Fund. Knights of Columbus Asset Advisors, an SEC registered investment advisor, serves as the investment manager of Knights of Columbus Charitable Fund, and the assets are invested in investment funds managed by Knights of Columbus Asset Advisors. Investing involves risk. The value of an invested donation will fluctuate over time and may gain or lose money.

Information provided is educational in nature and is not intended as legal, tax, financial, or other professional advice. Knights of Columbus Charitable Fund does not provide legal, tax, financial, and other professional advice. You should consult professional advisors concerning the legal, tax, or financial consequences of your charitable activities. Tax information provided relates to federal tax matters only, and availability of certain federal tax deductions may depend on whether you itemize deductions.

Colorado: Colorado residents may obtain copies of registration and financial documents from the office of the Secretary of State, 303-894-2860, www.sos.state.co.us/ registration number pending Florida: A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE 1-800-HELP-FLA OR ONLINE AT www.FloridaConsumerHelp.com, REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. REGISTRATION # PENDING Maryland: For the cost of postage and copying, documents and information filed under the Maryland charitable organizations laws can be obtained from the Secretary of State, Charitable Division, State House, Annapolis, MD 21401, 800-825-4510. "Mississippi: The official registration and financial information of Knights of Columbus Charitable Fund may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167. Registration by the Secretary of State does not imply endorsement by the Secretary of State New Jersey: INFORMATION FILED WITH THE ATTORNEY GENERAL CONCERNING THIS CHARITABLE SOLICITATION AND THE PERCENTAGE OF CONTRIBUTIONS RECEIVED BY THE CHARITY DURING THE LAST REPORTING PERIOD THAT WERE DEDICATED TO THE CHARITABLE PURPOSE MAY BE OBTAINED FROM THE ATTORNEY GENERAL OF THE STATE OF NEW JERSEY BY CALLING 973-504-6215 AND IS AVAILABLE ON THE INTERNET AT <http://www.njconsumeraffairs.gov/charity/chardir.htm>. REGISTRATION WITH THE ATTORNEY GENERAL DOES NOT IMPLY ENDORSEMENT New York: Upon request, a copy of the latest annual report can be obtained from the organization or from the Office of the Attorney General, by writing the Charities Bureau, 120 Broadway, New York, NY 10271. North Carolina: Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989. The license is not an endorsement by the State. Pennsylvania: The official registration and financial information of Knights of Columbus Charitable Fund may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1 (800) 732-0999. Registration does not imply endorsement. Virginia: Financial statements are available from the State Division of Consumer Affairs, Department of Agricultural and Consumer Services, P.O. Box 1163, Richmond, VA 23218. Washington: The notice of solicitation required by the State Office of Consumer Affairs is on file with the Washington Secretary of State, and information relating to financial affairs is available from the Secretary of State, and the toll-free number for Washington residents: 800-332-4483 West Virginia: West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, West Virginia 25305. Registration does not imply endorsement.