



INSTRUMENT OF TRANSFER
Corporate Advised Fund

Truman Heartland Community Foundation
4200 Little Blue Parkway, Ste. 340
Independence, Missouri 64057

To establish the _____ **Fund**, (hereinafter called the "Fund"),
_____ **[name of company]** hereby transfers, conveys and pays over to The
Truman Heartland Community Foundation (the "Community Foundation"), as a charitable contribution,
the following: _____. The Community Foundation is authorized to accept
additional contributions to the Fund in terms substantially similar to those set forth herein.

_____ **[name of company]** requests that **(income and principal) (annual net income only)** from the Fund be available for distribution in accordance with the charitable purposes set forth in the Bylaws of the Community Foundation. *Net income shall be defined as an amount that shall be computed annually based upon the current spending policy of the Community Foundation (currently 5% of the average past three year-end Fund balances).* Distributions shall be made by the Disbursement Committees of the Community Foundation, or such other committees as may be designated by the Board of the Community Foundation, after receiving the advice in writing from _____ **[name of company]**.

A grant advisory committee (the "Committee") shall be established by _____ **[name of company]**. The Committee shall operate under its own rules of procedure. The Community Foundation may act upon receiving the written recommendation of the Chairperson of the Committee or other individuals under such rules of procedure as the Committee shall adopt.

We hereby acknowledge receipt of the Administrative Fee Schedule attached hereto as **Exhibit A** and accept the terms of said schedule. We further understand the fee schedule is subject to modification and may be increased or decreased at the sole discretion of the Community Foundation's Board of Directors. We agree to be bound by the most current schedule of fees published by the Community Foundation. Furthermore, we are familiar with the Community Foundation's Fund Investment Program and recommend the allocation, as described on **Exhibit B**, be applied to the Fund. We further understand that prior to receipt of a signed Investment Recommendation Form all contributions to the Fund will be held in the THCF Money Market account.

We are familiar with and accept the terms of the Procedures for the Establishment and Operation of Funds of the Bylaws of the Community Foundation. We also understand that the Community Foundation, through its duly authorized committees, reserves the right to make the final decision regarding distributions from the Fund. If _____ **[name of company]** ceases to exist as a legal entity, the Community Foundation shall use the principal and income from the Fund for its general and charitable purposes as set forth in the Bylaws.

Yours very truly,
DONOR NAME
ADDRESS
PHONE
EMAIL

Donor Signature

Date Signed

Accepted By
Truman Heartland Community Foundation:

President & CEO Signature

Date Signed