



INSTRUMENT OF TRANSFER
Unrestricted Fund

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

To establish the _____ **Fund** (hereinafter called the "Fund"), we (I) hereby transfer, convey and pay 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.

(We) (I) request that the annual net income from the Fund be used for general and charitable purposes as 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). The types and amounts of grants shall be at the discretion of the Board of Directors of the Community Foundation or such other committees as may be designated by the Board of the Community Foundation.

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 understand that the Fund will be invested according to the Community Foundation's investment policy.

(We) (I) (are) (am) familiar with and accept the terms of the Procedures for the Establishment and Operation of Funds of the Bylaws of the Community Foundation.

Yours very truly,

DONOR NAME

ADDRESS

PHONE

EMAIL

Donor Signature

Date Signed

Accepted By
Truman Heartland Community Foundation:

President & CEO Signature

Date Signed