



Community Investment Fund Application (Corporate)

The purpose of this application is to obtain sufficient information to prepare a Deed of Gift for the establishment of a named community investment fund (the "Fund"). The Fund is established when the initial capital contribution from the donor has been received by the Foundation and the Deed of Gift is properly signed by all parties.

Section One DONOR INFORMATION

Donor Information

_____ (Please print full organization name)			_____ Mailing Address	
			()	
_____ City	_____ Province	_____ Postal Code	_____ Phone Number	
_____ Contact Name			_____ Title	
			()	
_____ Email Address			_____ Phone Number	

Section Two FUND NAME

Name of the Fund (e.g. The Leading Credit Union Community Investment Fund)

Fund purpose: (the more specific the better, e.g. local charities focused on welfare of children)

Section Three INVESTMENT MANAGEMENT

- Donor understands that the Board of Directors of OCUF has the fiduciary obligation of managing the assets of the Foundation, including all amounts in the Fund. Donor understands that OCUF has the sole and final authority to select any investment managers or dealers, monitor their performance and change the asset allocation and investment management mandates as necessary and in compliance with all applicable laws.

Section Four SELECTION OF CHARITIES

- As listed below List attached List to follow at later date

Name of Canadian Registered Charity or Qualified Donee (up to 4)	% of Annual Disbursements (must equal 100%)
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

Recommended Grants from the Account

- Donor confirms that to the best of its knowledge the selected recipients for grants from the Fund are registered charities or qualified donees registered with Canada Revenue Agency. Donor acknowledges that all recommendations are subject to final confirmation and approval by the Ontario Credit Union Foundation (OCUF) and that OCUF will disburse the grants from the Fund in accordance with the terms of reference for Community Investments Funds, as amended.

Your Privacy

- Donor acknowledges that grants made by the Foundation from the Fund to recipients are typically accompanied by a letter indicating that the grant was made from a fund of the OCUF established by the donor. If the donor wishes anonymity with regard to grants from the Fund, please advise the Foundation and it will withhold identifying information from the grant letter.

Section Five DISBURSEMENT OPTIONS

Please select one option – initial in applicable space and provide particulars.

1. **Minimum Required Disbursement Amount*** (“MRDA”)

*MRDA of the Fund is the proportional allocation of the Foundation’s total disbursement quota attributed to the Fund.

2. **Annual Income of the Fund****

**If annual income does not exceed MRDA, the Foundation will disburse the MRDA.

3. **Annual Fixed Amount*****

Fixed Amount: \$ _____

***If annual fixed amount does not exceed MRDA, the Foundation will disburse the MRDA.

Section Six ADVISOR AND SUCCESSOR

Initial Advisor

Name _____ Phone Number () _____

Address _____

Email Address _____

Successor Advisor

As listed below Advisor has right to appoint successor No successor

Name _____ Phone Number () _____

Address _____

Email Address _____

Donor understands that it has the right to change advisors or successors, in accordance with the terms of reference for Community Investments Funds, as amended.

Section Seven SIGNATURE SECTION

OCUF may use this information to help prepare and administer the Fund, to establish, maintain and manage our relationship with you, including the maintenance of an accurate records; to verify your identity and to protect against fraud; to satisfy regulatory obligations and other legal requirements; and to create statistics about our operations and understand the current and future needs and preferences of donors. OCUF may also offer you further opportunities for giving.

Donor acknowledges and confirms that:

- Any contribution to the Fund represents an irrevocable gift to OCUF and is not refundable to the Donor for any reason.
- Donor and persons not-at-arms-length with the Donor will not receive any benefit or advantage as a result of the making of the recommended grant(s), including but not limited to the payment of tuition or other expenses.
- The recommended grant(s) do not fulfill a pre-existing legally enforceable pledge or other legal obligation.
- The Fund, once established, will be administered in accordance with the Deed of Gift, the terms of reference for Community Investment Funds and the policies of OCUF in effect from time to time, as well as all laws applicable to Canadian registered charities.

On behalf of:

(Please print full organization name)

Date (mm/dd/yyyy)

Per: _____
(signature)

(Please print name and title)

Ontario Credit Union Foundation

Charitable Registration # 11906 7692 RR0001
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A-CIF-C June 25, 2015