

# Renaissance

## Contribution Procedures

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### CASH

1. **Trust Document Executed**-- Make certain the trust document has been executed and the Trustee has accepted his/her office.
2. **Investment Account Established**-- The Trustee should establish (or cause to be established) an investment account in the name of the trust. Gift Administration Services, Inc. (Gift Administration) *must* be the address of record on the account. A sample account name and address follow:

**Trustee (or IST)**  
**John & Mary Doe CRT U/A 01/01/00**  
**c/o Gift Administration Services, Inc.**  
**6100 W. 96th St., Suite 100**  
**Indianapolis, IN 46278**

If the trust is new and Gift Administration has not yet obtained a Tax ID Number for the trust, the account may be opened without one. Simply indicate that the number has been "applied for." Do not use the social security number of a donor or trustee under any circumstances. Gift Administration will obtain the Tax ID Number and communicate it to the attorney of record and the advisor once evidence of funding has been received. Gift Administration should receive a photocopy of the executed account application including the name and address of the firm, the account number and a contact person, if applicable.

If a firm will not allow an account to be opened without a Tax ID Number, Gift Administration will apply for one upon receipt of a faxed copy of the front page and all signature pages of the trust document, evidence of funding, an IRS Form 2848 and SS-4 signed by the trustee(s) and social security number(s) of the Grantor(s). The attorney can also apply for the Tax ID-Number. If this is the case, Gift Administration will require a copy of the SS-4 form.

3. **Verification of Deposit**-- Documentation should be forwarded to Gift Administration verifying that the contribution has been made, along with the date the donor relinquished control of the asset.

These procedures are intended for informational purposes only and should not be construed as legal or tax advice. For more information on these procedures, please contact legal counsel or an appropriate tax advisor.