



# First Hand Family New Account and Donor Contribution Agreement

New Account    Account Change    Additional Funding

Completed by First Hand Family - Fees (Minimum \$10 per year): \_\_\_\_\_ .2%   \_\_\_\_\_ .4%   \_\_\_\_\_ .8%

First Hand Family DonorFirst Account # \_\_\_\_\_

Please print clearly in all CAPITAL LETTERS to fill out this agreement. For assistance, contact the First Hand Foundation (the "Foundation"). Return this completed, signed agreement along with an Asset Transfer Request Form to the Foundation. Before completing this document, please:

1. Read the First Hand Family Donor Handbook ("Donor Handbook"). The Donor Handbook includes important information on your irrevocable, nonrefundable contribution and features of the program.
2. Evaluate your philanthropic goals
3. Discuss with the Foundation how a donor-advised fund can help you meet your charitable giving needs.
4. Decide if you want to establish a donor account as an individual or include others.
5. Consult your tax and/or legal advisor before contributing to the Foundation.

**Please note:**

- Your charitable income tax deduction receipt and Form 8283 (if applicable) will not be sent to you and a deduction will not be available to you until your transferred assets have been received by the Foundation and are in your First Hand Family Fund account.
- The minimum initial contribution is \$1,000.
- Market conditions may affect your actual contributed amount.
- **Once completed, please submit to Seth Baker for processing: Fax 816.201.6740 or email [seth.baker@cerner.com](mailto:seth.baker@cerner.com)**

## Donor Information

Individual Donor or Joint Donors

<b>Primary Name</b>	Last	First	MI	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
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Street address	City	State	Zip
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Home Telephone	Business Telephone
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Social Security Number	Birth Date (MM/DD/YYYY)
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E-mail Address
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<b>Donor 2</b>	Last	First	MI	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
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Street address	City	State	Zip
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Home Telephone	Business Telephone
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Social Security Number	Birth Date (MM/DD/YYYY)
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E-mail Address
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## Naming Your Account

Please create a name for your First Hand Family fund account. You can name the account after your family or any other name that you choose. With each grant recommendation, you may elect to have the accompanying letter acknowledge a donor's name, your personalized account name (e.g., The Smith Family Fund), "in memory of" or "in honor of" another individual or as an anonymous gift.

Personalized Account Name:

## Name of Successor(s) to Donors

You may name individual successors or elect the Foundation to succeed you in advising on grant making for your account after the death or non-responsive five year inactivity of all the original donors.

Special Instructions: Upon the death or incapacity of the original donor(s), please select one of the following options (Required if more than one successor)

1.  Successors 1 and 2 will succeed the account and share equal responsibility over the account.
2.  Successors 1 and 2 will split the account into two (2) separate and equal accounts.

<b>Successor 1</b>	Last	First	MI	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
	Street Address	City	State	Zip
	Home Telephone	Business Telephone		

<b>Successor 2</b>	Last	First	MI	<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms.
	Street Address	City	State	Zip
	Home Telephone	Business Telephone		

## Name Charitable Area(s) of Interest

Please name an area of charitable interest and/or a geographic area of interest where grants may be made. This will provide guidance to the Foundation in case you, your advisor(s), successor(s), are unavailable.

## Recommend an Asset Allocation

***Assets will arrive from donor in the following manner:***

From: \_\_\_\_\_

Type of security and name of security: \_\_\_\_\_

Dollar amount or # of shares: \_\_\_\_\_

**Please recommend a strategy(ies) for your First Hand Family Fund account. You may choose only one "investment strategy" or a combination of funds within the "individual investment strategies," which must total 100 percent.**

Investment Strategies (choose one): Individual Investment Strategies (must maintain \$1 million in assets):

_____ %	Appreciation Strategy
_____ %	Balanced Strategy
_____ %	Income Strategy
_____ %	Money Market

\_\_\_\_\_ %

Cerner Stock

**Administration of the Account**

The Disbursement Committee has the authority to execute grant recommendations for my First Hand Family Fund account on my behalf upon my submission of a signed Grant Recommendation Form.

The assets of my account will be distributed for charitable purposes, and shall be administered pursuant to the governing instruments of the Foundation, as they may be amended from time to time.

I understand that I may make written recommendations of the qualified domestic charities and government institutions to receive grants from my account. I understand that no grants may be made to private foundations, to satisfy a pre-existing pledge, for any private benefit or to support any political campaign activities. I also understand that the Board of Directors of the First Hand Foundation remains the final authority to determine the amount and recipient of any grant and my grant recommendations do not have to be followed.

I understand that the Foundation will charge administration fees charged against my account and pay investment management, advisory, and administration fees in accordance with its standard procedures.

**Acknowledgement of Terms**

The First Hand Family is a program offered in conjunction with the First Hand Foundation, an IRS Section 501(c)(3) charitable organization. By signing this form, I authorize the Foundation to establish a First Hand Family Fund account. I have received the Donor Handbook and I understand that I am responsible for reading it. I agree to be legally bound by the Donor Handbook's terms and conditions, as currently in effect and as amended from time to time, and the terms and conditions set forth in all related forms.

I understand that any contributions I make to the First Hand Family Fund are irrevocable and nonrefundable to me for any reason. I realize that any dividend interest and capital gains generated from my First Hand Family Fund account belong to the First Hand Foundation. Therefore, I cannot and will not claim that income as additional tax deductions. Once my contributions have been accepted, they are the property of the Foundation governed by an independent Board of Directors. I understand that the fund's investments could sustain a loss which would lead to there being less money for donor advised contributions than I originally contributed. I am aware that any recommendation that I suggest will be considered but are subject to approval by the Disbursement Committee concerning the grants and awards to any charitable organizations.

To the best of my knowledge, all information enclosed is accurate and I will immediately notify the Foundation if any changes occur. My signature below constitutes my agreement and acceptance of all terms, conditions and features selected in this application, and in all additional forms. SIGNATURES ARE REQUIRED FROM ALL DONORS LISTED ON THE ACCOUNT.

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

Rev. 01/09 First Hand Foundation

Signed: \_\_\_\_\_

\_\_\_\_\_  
Date

**Information to be provided back to First Hand Foundation**

The following information will be provided through the DonorFirst Platform:

**Donor's Invitation Instructions**

**Verification that the account has been set up, welcome and acknowledgement letter (including of high/low)**