

Use the following information when entering the account into CLIC, completing Cambridge paperwork, and preparing forms for DocuSign:

As the owner of the account, any references to the owner within the investment account application or paperwork should be completed to reflect RCF's information, *not* that of the donor.

Clearly indicate on the account application each section that requires officer information, and each signature line where the RCF officers must sign or initial. The officers of RCF will sign the investment account application and each will have individual authority to transact business in the account. Once the paperwork has been completed, it can be sent via Cambridge's DocuSign system (preferred) OR you may send the paperwork directly to the RCF team via email at CCGF@reninc.com. If using Cambridge's DocuSign, please send directly to Greg Baker for signature at gregbaker@rcgf.org. The officers of RCF are authorized to act independently – *only one officer needs to sign the application*.

Do not permit margin trading in the account, per RCF policy.

► RCF Information

Account title	Renaissance Charitable Foundation Inc. ATTN *DAF Account Name*. For example: Renaissance Charitable Foundation Inc. ATTN: Juan & Maria Smith Charitable Gift Fund		
Address	8910 Purdue Road, Suite 555, Indianapolis, IN 46268		
Phone Number	844-757-3521		
Entity Email	CCGF@reninc.com		
Delivery Preferences	Email for investment account statements ONLY to RCFSTMT@reninc.com		
Federal Tax ID Number	35-2129262		
IRS W-9 Exempt Payee Code	ONE		
IRS W-9 Exempt FATCA Code	A		
Account Type	Select the option on the account application that best applies to RCF's status as a non-profit entity and C-corporation.		
Beneficial Owners	As a charity, there are <i>NO</i> beneficial owners		
Control Person	Gregory W. Baker		
Annual Income	\$1M+		
Source of Income	Gifts/sale of existing assets		
Net worth	\$2.4B+ Mutual Funds: \$400M/30% Annuities/Insurance: \$50M/4% Hedge Funds/Alternatives: \$100M/7% Stocks: \$400M/30% Cash: \$100M/7% Other: \$100M/7% Real Estate: \$2M/<0% Bonds: \$200M/15% Based on the information above, RCF is a Qualified Investor, Qualified Purchaser, Accredited Investor, and is an Institutional Investor.		

Risk Tolerance and Primary Investment Objective	Moderate Aggressive, Growth and Income
Secondary Investment Objective	Growth and Income
Time Horizon and Liquidity Needs	Account Time Horizon: 5-10 years Annual Expenses: 5% Special Expenses Time Frame: 5+ years
Source of Income	Gifts/sale of existing assets
Federal Income Tax Bracket	0%
Investment Knowledge	(1- None through 4- Extensive) Extensive knowledge of: Stocks: 4, Bonds: 4, Insurance/Annuities: 4, Mutual Funds: 4, REITs/DDPs/LPs: 4, and Real Estate: 4. Frequent knowledge of Options: 3 and Commodities: 3
Current Holdings Outside Cambridge	Stocks: \$800 Million, Bonds: \$295 Million, Real Estate: \$5 Million, Mutual Funds: \$900 Million, Cash/Bank Products: \$90 Million, Other (Hedge): \$250 Million
Trusted Contact	Because RCF is a nonprofit corporation with multiple officers listed on each account, a Trusted Contact is not necessary.
Margin Trading	Not permitted, per RCF policy.
RCF Receiving Account Information for Standing Payment Instructions	<p>This is not to be used to send contributions – all contributions should be directed into the Cambridge investment account.</p> <p>Account Name: Renaissance Charitable Foundation Account Type: Checking Account Number: 1361716 Routing Number: 074006674 (this is also used for ACH and Wires) Account Signers for Renaissance: Andrew Barton, Gregory W Baker, and Douglas W Cox Bank Address: The National Bank of Indianapolis 107 N. Pennsylvania St. Suite 700 Indianapolis, IN 46204</p>