LegacyWay

IMPACT FUND APPLICATION

Please complete all information in this application form ("Application"). Print in ink or type. LegacyWay recommends $5,000 for an initial contribution but there is no minimum. Each additional contribution must be at least $1,000.

Return completed forms to:

LegacyWay
901 Commerce St., Ste. 600
Nashville, TN 37203

Tel: 855 446 0929
Fax: 615 255 1832
Email: servingyou@legacyway.org

1. IMPACT FUND INFORMATION

An Impact Fund, also called a donor-advised fund, can be named after a Donor, a member of the Donor's family, the Donor's family, or it can reflect an area of interest to the Donor or such family member (e.g., John Donor Family Fund, or the Donor Fund for Central Asian Missionaries). Unless a Donor or Grant Advisor recommends that a grant be made anonymously, the name of the Donor-Advised Fund will be used in correspondence to the charitable organization that receives the grant from the Fund.

Impact Fund Name

2. DONOR INFORMATION

Name the Donor(s) who will contribute to and advise on the Fund. Please note that the Primary and Additional Donor will automatically be established as Grant Advisors. To name additional Grant Advisors, complete Section 4.

PRIMARY DONOR

Full Name

Social Security Number | Date of Birth

Street Address

City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

ADDITIONAL DONOR

Full Name

Social Security Number | Date of Birth

Street Address

City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

3. CONTRIBUTIONS

A Donor to An Impact Fund may transfer cash (via wire or check), publicly traded securities, or other property to LegacyWay, per the instructions below. **You and your financial advisor must initiate all transfers to LegacyWay.**

CASH GIFTS

$ ______________________________

WIRE TRANSFER INSTRUCTIONS:

Bank: Pinnacle Bank

Address: 150 3rd Avenue South, Nashville, TN 37201

ABA#: 064008637

Account#: 800108416793

FBO/FFC: LegacyWay DAF

Memo Detail: Account Name

CHECK GIFTS

$ ______________________________

MAIL INSTRUCTIONS:

- **Make check payable to:**
  LegacyWay
- **Include in the memo section of the check:**
  Donor Name or Account Name
- **Mail check to:**
  LegacyWay
  901 Commerce Street, Suite 600
  Nashville, TN 37203

GIFTS OF PUBLICLV-TRADED SECURITIES

There are two main ways to make a stock gift to LegacyWay: by electronic transfer or by mailing your certificates. Electronic transfer works much faster.

The date of a Donor's gift is the date on which the Donor gives up control. In most cases, this is the date the Donor transfers the shares electronically into LegacyWay's account or the postmark date on which the Donor mails the Donor's certificates, stock powers, stock waivers, and/or Letters of Authorization to LegacyWay. In some cases, the date of the gift is delayed until the company's transfer agent changes its official records to reflect ownership of the shares by LegacyWay. In most cases, the tax-deductible value of a Donor's gift is the average of the highest and lowest trading prices on the date of the Donor's gift multiplied by the number of shares given.

ELECTRONIC TRANSFER OF PUBLICLY- TRADED SECURITIES

Donor must complete the information below relating to the securities subject to the gift. Please note that LegacyWay, Inc. does NOT initiate the asset transfer. A Donor must complete the letter of authorization transfer form of the custodian that holds the securities that the Donor intends to transfer and submit the same to such custodian or the Donor's financial advisor, in order for the transfer to be initiated. **You or your financial advisor must initiate all transfers to LegacyWay.**

DTC/ACAT
Broker-Dealer Name: Northern Trust
(Custodian) DTC Participant#: 2669
ACCOUNT NAME: Southern Baptist Foundation
Account#: 4492737

For Physical Stock Certificates, Euroclear, GNMA/Government Securities, Foreign Equities, and DRS/DWAC Deliveries, please contact LegacyWay at 855 446 0929 to coordinate delivery.

Name of Custodian (that holds and will deliver the securities)		Owner(s) of Security	
Name of Security Issuer	CUSIP or Symbol	Number of Shares	Approximate Dollar Value

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PLEASE NOTE: The Donor or the Donor's financial advisor needs to initiate an in-kind transfer of the above securities using the instructions on page 2.

MAILING OF SECURITIES HELD IN CERTIFICATE FORM

Please contact LegacyWay at **855 446 0929** for forms needed to gift physical share certificates. DO NOT sign the back of your certificate(s). Doing so will delay the date of a donor's gift until the certificates are transferred into the name LegacyWay.

4. GRANT ADVISORS

A Donor can appoint one or more individuals as Grant Advisors of the Fund. These Grant Advisors will have authority to recommend grants to be made by the Fund. Grant Advisors appointed by Donor will not succeed the Donor unless they are named as Fund Successors (see Section 5 below). Do not list in this Section 4 any Donor(s) named in Section 2, as such Donors are automatically established as Grant Advisors.

GRANT ADVISOR 1:

First Name M.I. Last Name | Date of Birth (mm/dd/yyyy) | SSN/TIN

Street Address of Residence (no P.O. Box address) | City | State | Zip

Mailing Address (if different from above) | City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

GRANT ADVISOR 2:

First Name M.I. Last Name | Date of Birth (mm/dd/yyyy) | SSN/TIN

Street Address of Residence (no P.O. Box address) | City | State | Zip

Mailing Address (if different from above) | City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

5. FUND SUCCESSORS AND CHARITABLE BENEFICIARIES

Donors have the option to recommend what should occur with the Fund upon their death. There are three options:

(1) The Donors name one or more successors to the Fund to succeed the Donors after their death {Fund Successors).

(2) The Donors recommend specific Charitable Beneficiaries to receive either:

- (A) all of the remaining assets with respect to the Fund, OR
- (B) annual grants from the remaining assets in the Fund (the recommended annual grants may be a percentage of the annual value of the Fund or a set dollar amount per charity, but, if the aggregate value of the annual grants is less than 40% of the annual value of the Fund, LegacyWay may increase the grants pro rata so that the aggregate value of the annual grants is 40% of the annual value of the Fund).

(3) The Donors make a recommendation in a letter of instruction delivered to LegacyWay. Letters of instructions typically are used in connection with large contributions and include a level of specificity beyond the scope of this form.

Please fill-in either the Fund Successor(s) section immediately below OR the Charitable Beneficiary(ies) section immediately thereafter (or attach a letter of instruction).

FUND SUCCESSOR(S)

Upon the death or incapacity of all of the original Donors of the Fund, please select one of the following options:

_____ Successors will succeed the prior grant advisor and share equal rights to make recommendations.

_____ The Fund will split and be divided equally into separate Funds. Your financial advisor will contact the successors to name each newly created Fund, and, if necessary, to reallocate investments and to name advisor(s) and successor(s) to the newly created Fund.

SUCCESSOR 1:

First Name M.I. Last Name | Date of Birth (mm/dd/yyyy) | SSN/TIN

Street Address of Residence (no P.O. Box address) | City | State | Zip

Mailing Address (if different from above) | City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

SUCCESSOR 2:

First Name M.I. Last Name | Date of Birth (mm/dd/yyyy) | SSN/TIN

Street Address of Residence (no P.O. Box address) | City | State | Zip

Mailing Address (if different from above) | City | State | Zip

Home Phone | Business Phone | Mobile Phone

Email Address

-OR-

CHARITABLE BENEFICIARY(IES)

Donors may elect that upon the death of all original donors, the remaining assets in the Fund are granted to charitable organizations either immediately or in an annual amount of at least 40% of the annual value, if one of these is the intended option, please complete this section in its entirety. In the event the recommended charity no longer exists or does not qualify to receive grants from an Impact Fund, LegacyWay will award grants to a charity similar to the original charity.

Recommendation:
(please check the applicable box)

☐ Grant of the Balance of the Fund Assets

☐ Annual Grant of the Annual Value of the Fund (Not Less Than 40%)

CHARITABLE ORGANIZATION 1:

Official Name

Mailing Address (grants are mailed directly to the charitable organization)

City | State | Zip

Tax ID Number (if known) | Email Address (if known) | Organization's Website (if known)

Contact Person at Organization | Contact Phone

If an Annual Grant is recommended, the annual grant to the organization shall be either _______%
of the Annual Value or $______________________.

CHARITABLE ORGANIZATION 2:

Official Name

Mailing Address (grants are mailed directly to the charitable organization)

City | State | Zip

Tax ID Number (if known) | Email Address (if known) | Organization's Website (if known)

Contact Person at Organization | Contact Phone

If an Annual Grant is recommended, the annual grant to the organization shall be either _______%
of the Annual Value or $______________________.

6. FINANCIAL PROFESSIONAL INFORMATION (TO BE COMPLETED BY THE FINANCIAL PROFESSIONAL, IF ANY}:

To prevent delays, please complete this section in its entirety.

Financial Professional	Name of Firm
Email Address	Phone Number

Main Office Address	City	State	Zip
Branch Address	City	State	Zip

Signature	Date

7. RECOMMEND AN INVESTMENT STRATEGY:

LegacyWay offers multiple investment strategies for Impact Funds. You may recommend one or more options from the list below.

LegacyWay Funds

__ Income Fund	%
__ Flexible Income Fund	%
__ Enhanced Cash Fund	%
__ Short Term Fund	%
__ Balanced Fund Monthly	%
__ Equity Fund	%
__ Enhanced S&P 500 Fund	%
__ US Growth Fund	%
__ US Small Cap Fund	%
__ US Value Fund	%

Guidestone Funds

__ Real Estate Securities Fund	%
__ Balanced Allocation Fund	%
__ Conservative Education Fund	%
__ Growth Allocation Fund	%
__ Aggressive Allocation Fund	%
__ Growth Equity Index Fund	%
__ International Equity Fund	%
__ Strategic Alternatives Fund	%
__ Value Equity Index Fund	%
__ Money Market Fund	%
__ Emerging Markets Equity Fund	%
__ Defensive Market Strategies	%
__ Low-Duration Bond Fund	%
__ Medium-Duration Bond Fund	%
__ Impact Bond Fund	%
__ Global Bond Fund	%
__ Equity Index Fund	%
__ Growth Equity Fund	%
__ Small Cap Equity Fund	%
__ Value Equity Fund	%
__ International Equity Index Fund	%
	%

Total 100% (Allocations must total 100%)

Contributions to a Fund are not held in a segregated investment account. Instead, all contributions to all Funds within the LegacyWay Impact Fund for which the same investment strategy has been selected are aggregated into one investment. LegacyWay maintains individualized records with respect to each Fund, allowing each Donor or Grant Advisor of a specific Fund to view at any given time the investment balance, contribution history and grant history with respect to such Fund.

8. ACKNOWLEDGMENTS

The LegacyWay Impact Fund is a program sponsored and operated by LegacyWay., a 501(c) national public charity under the Internal Revenue Code of 1986.

BY SIGNING THIS APPLICATION:
The undersigned person or persons (hereafter referred to in the singular as Donor) authorizes LegacyWay to establish an Impact Fund. The Donor hereby acknowledges that Donor has received and read the LegacyWay Impact Fund Circular and agrees to be legally bound by (1) the terms and conditions of the LegacyWay Impact Fund Circular, as currently in effect and as amended from time to time, (2) the terms and conditions of the Application, or (3) any selection or recommendation made by Donor from time to time, whether in the Application, any other document or form related to the Impact Fund or otherwise communicated by the Donor, directly or indirectly, to LegacyWay.

The Donor is aware that any recommendation suggested by the Donor in Donor's capacity as Grant Advisor, including concerning the selection of the investment strategy or the investment adviser or the amount or recipient of any grant award to any charitable organization, is advisory in nature. While any such recommendation of Donor will be considered by LegacyWay, LegacyWay has the sole and exclusive authority and discretion to reject any recommendation and make its own determinations, including as to the investment and disbursement of any contributions to any Impact Fund. The Donor understands that no grant may be made to a private non-operating foundation to satisfy a pre-existing pledge, for any private benefit (dues, membership, etc.) or to support any political campaign activity. The Donor understands that any contribution that Donor makes to LegacyWay is irrevocable and not refundable to Donor for any reason.

The Donor realizes that any dividend interest and capital gain generated from any Impact Fund belong to LegacyWay; therefore, the Donor cannot and will not claim that income as additional tax deductions. Once any contribution is accepted, it is the property of LegacyWay, governed by an independent Board of Directors. The Donor understands that LegacyWay will charge the Fund (and deduct from any Fund balance) all applicable administration fees and investment advisory fees, in each case, consistent with its standard procedures. The Donor certifies that, to the best of the Donor's knowledge, all information presented in connection with this Application is accurate and agrees to notify LegacyWay promptly of any changes.

Signature ____________________ Date ____________

Printed Name of Donor ____________________

Signature ____________________ Date ____________

Printed Name of Donor ____________________

If married, both donors should sign.

Return completed form to:
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Nashville, TN 37203

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Fax: 615 255 1832

Email: servingyou@legacyway.org