



Refer to the Online Giving Program Guide for details regarding your fund with the Presbyterian Foundation. The following information will assist in establishing your fund.

## 1. ORGANIZATION INFORMATION

Organization Name \_\_\_\_\_ Federal Tax ID \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Web Address \_\_\_\_\_

Email \_\_\_\_\_

(For general organizational correspondence)

Our Organization is

☐ Presbyterian

☐ Presbyterian-Related (Provide completed Presbyterian Relatedness Form)

Organization Mission Statement:

## 2. BANK INFORMATION

A voided check must be included for this account to be verified. The account for which a check is provided will be where the funds are deposited upon monthly disbursement.

☐ Voided check included

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

## 3. ONLINE GIVING FUND INFORMATION

**Write the fund name and purpose as you wish it to be displayed online.** The name is unique to your ministry. You may establish multiple funds to address various projects. If necessary, list additional funds on another sheet. Please note if you wish to establish a fund for non-charitable payments.

Fund Name \_\_\_\_\_  
(ex. General Fund)

Restrictions? ☐ Yes ☐ No

If yes, what restrictions? \_\_\_\_\_

Fund Name \_\_\_\_\_

Restrictions? ☐ Yes ☐ No

If yes, what restrictions? \_\_\_\_\_

Would you like to receive a complimentary set of pew cards? ☐ Yes

☐ No

## 4. FUND ADMINISTRATORS

Assign responsibility to the appropriate individuals for the fund management activities listed below. Include additional administrators on another sheet. Note: All fund access is online.

- Access donor and gift information
- Access fund summary information (including fund balances and withdrawal history)
- Make withdrawal requests
- Request administrative changes to funds
- Add/Remove other administrators

Administrator Name (print) \_\_\_\_\_ Position \_\_\_\_\_

Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

Is this individual an employee of the organization? ☐ Yes ☐ No

Administrator Name (print) \_\_\_\_\_ Position \_\_\_\_\_

Different Email than above (required) \_\_\_\_\_ Phone \_\_\_\_\_

Is this individual an employee of the organization? ☐ Yes ☐ No

Promoter Name (print) \_\_\_\_\_

Promoter Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

Grant Administrator Access? ☐ Yes ☐ No

## 5. AUTHORIZATION

I certify that each of the people listed above is authorized to access the information and activities stated in the Fund Administrator Section checked above. I further certify that we have read and agree to the Online Giving Program, including the Terms & Conditions, as set forth in the Guidebook.

Authorized Signer Name (print) \_\_\_\_\_ Position \_\_\_\_\_

Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

Are you an employee of the organization? ☐ Yes ☐ No

Grant the authorizer fund access? ☐ Yes. Will make them a Fund Administrator ☐ No

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

### Please submit:

☐ your completed application, ☐ a voided check, ☐ and documentation of Presbyterian relatedness.

For quickest set up, fill this out electronically and email: [oneservices@presbyterianfoundation.org](mailto:oneservices@presbyterianfoundation.org)

**Note:** Fund Administrators and Authorized signer will receive a welcome email with information regarding fund administration upon the establishment of your funds.



200 E 12th Street, Jeffersonville, IN 47130  
800-858-6127 Fax: 502-805-0466 [presbyterianfoundation.org](http://presbyterianfoundation.org)