# Turkish Philanthropy Funds Additional Contribution Agreement



#### Instructions

Please return this completed, signed agreement to <u>senay@tpfund.org</u>. If you have any questions or need assistance, please call us at (646) 530-8988. Before completing this document, please:

- 1. Read the Turkish Philanthropy Funds Donor Circular and Disclosure Statement ("Donor Circular"). The Donor Circular includes important information on your *irrevocable*, *nonrefundable* contribution and features of the program.
- $2\ \ \, Consult your tax and/or legal advisor before contributing additional assets.$

#### Please note:

• You will receive a charitable income tax deduction receipt. A deduction will not be available to you until transferred assets have been received by Turkish Philanthropy Funds.

#### **Contribution Request**

I am making a donation to Turkish Philanthropy Funds of the property described in Section B. (Gift Information). I request, but do not require, that Turkish Philanthropy Funds use this donation to make a grant to the donor advised fund at Morgan Stanley Global Impact Funding Trust, Inc. ("Morgan Stanley GIFT") described in Section A. (Account Information).

#### A. Donor and Account Information

1. Account Information

DONOR ACCOUNTNAME DONOR ACCOUNT NUMBER (OPTIONAL) 2. Donor Information A. Individual Donor or Joint Donors Primary Donor (receives account statement) □ Mr. □ Mrs 🗆 Ms. MIDDLE INITIAL FIRST NAME LAST NAME SOCIAL SECURITY NUMBER DATE OF BIRTH (MM/DD/YYYY) Secondary Donor □ Mr. □ Mrs 🗆 Ms. MIDDLE INITIAL LAST NAME FIRST NAME SOCIAL SECURITY NUMBER **RELATIONSHIP TO DONOR** DATE OF BIRTH (MM/DD/YYYY) B. Trust, Corporation or Other Entity TAXPAYER ID NUMBER TRUST/INCORPORATION DATE TRUST NAME FULL LEGAL NAME OF CORPORATION/BUSINESS ENTITY

## B. Gift Information

Market conditions may affect your actual contributed amount. Please contact Turkish Philanthropy Funds for assistance.

#### □ 1. Cash

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DOLLAR AMOUNT	NAME OF FINANCIAL INSTITUTION WHERE CASH IS HELD	
<ul><li>2. Securities</li><li>Name of Security 1</li></ul>		
CUSIP (REQUIRED)	TICKER (REQUIRED)	
NUMBER OF SHARES/BONDS/MUTUAL FUNDS	MORGAN STANLEY ACCOUNT NUMBER	APPROXIMATE VALUE
Name of Security 2		
CUSIP (REQUIRED)	TICKER (REQUIRED)	
NUMBER OF SHARES/BONDS/MUTUAL FUNDS	ACCOUNT NUMBER	APPROXIMATE VALUE

**Market conditions may affect your actual contributed amount.** You may contribute additional cash and/or publicly traded securities to Turkish Philanthropy Funds and request grants to the donor advised fund at any time by completing an Additional Contribution Agreement. Donations of assets other than cash and/or publicly traded securities will require the advance approval of Turkish Philanthropy Funds and Morgan Stanley GIFT. Market conditions may affect your actual contributed amount.

# □ 3. Donation from Another Charitable Vehicle (e.g., Private Family Foundation or Other Donor-Advised Fund)

Please complete this section if you are interested in making an IMMEDIATE transfer. Please contact Morgan Stanley GIFT if you wish to make a FUTURE contribution from a charitable vehicle.

NAME OF CHARITABLE VEHICLE	DOLLAR AMOUNT

DESCRIPTION

## C. Investment Recommendation

Please recommend an asset allocation for your donor account. More complete information on the allocation pools may be found in the Donor Circular. Please note that the percentage(s) inserted below must add up to 100%. If you do not recommend an asset allocation, Morgan Stanley GIFT, Inc. will invest a contribution as follows: Money Market Pool.

## **Consulting Group Separate Account Pools\***

% Aggressive
% Growth
% Balanced
% Conservative
% Investing with Impact Aggressive
% Investing with Impact Balanced
% ETF Equities
% ETF Fixed Income
% Money Market Pool

# D. Acknowledgment of Terms

Turkish Philanthropy Funds is an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. Turkish Philanthropy Funds receives contributions from various donors which become subject to the control of Turkish Philanthropy Funds. Turkish Philanthropy Funds, in its discretion, may contribute property from time to time to Morgan Stanley GIFT for the purposes of establishing "private label" donor advised funds in the name of Turkish Philanthropy Funds' own donors. Morgan Stanley GIFT is an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and is the sponsor of a donor advised fund. Various divisions of Morgan Stanley Smith Barney, LLC provide investment management and administrative services to Morgan Stanley GIFT.

All contributions to Turkish Philanthropy Funds are irrevocable and non-refundable. Contributions and all related future earnings, including any income and appreciation thereon, are no longer the donor's assets; they are the property of Turkish Philanthropy Funds. While we believe that a private label donor advised fund provides a valuable philanthropic opportunity, contributions for such funds are not appropriate for everyone. Please see the Donor Circular for more complete information on the Turkish Philanthropy Funds private label donor advised fund, including a description of risks, fees and expenses.

By signing this form, I request that Turkish Philanthropy Funds use my donation to make an additional contribution to my account named in this agreement, the administration of which is governed by an existing Donor Contribution Agreement. I have received the Donor Circular and I understand that I am responsible for reading it. I agree to be legally bound by the Donor Circular'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 Turkish Philanthropy Funds are irrevocable and are nonrefundable to me for any reason. I realize that all dividends, interest, capital gains, or any other distributions generated from my donation belong to Turkish Philanthropy Funds. Therefore, I cannot and will not claim that income as an additional tax deduction. Once my donation has been accepted, it is the property of Turkish Philanthropy Funds. I understand that Turkish Philanthropy Funds is under no obligation to make grants to a donor advised fund maintained by Morgan Stanley GIFT or any other sponsoring organization. I understand that Morgan Stanley GIFT investments could sustain a loss which would lead to there being less money to donate than Morgan Stanley GIFT originally received from Turkish Philanthropy Funds. I am aware that any recommendations I suggest will be considered but are subject to final approval by the Board of Directors of Morgan Stanley GIFT, concerning the investment selections, grants and award to any charitable organization.

I understand that the Select UMA Investment Pools and Money Market pool may lose money.

I understand that market conditions may affect the actual contributed amount.

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

DONOR SIGNATURE

DATE

DONOR SIGNATURE

DATE