Financial Advisor Acknowledgment

The undersigned Advisor acknowledges that they have received and reviewed the Independent Charitable Gift Fund (iGiftFund) Statement of Investment Objectives and Guidelines.

The Advisor further acknowledges and agrees that:

- iGiftFund is the legal owner of all assets held in Funds sponsored by the organization.
- As legal owner of the assets, iGiftFund is the Advisor's client.
- The Advisor acknowledges that their responsibilities with respect to Fund assets are owed to iGiftFund. If the Advisor's relationship with the donor changes or ends, the Advisor will promptly notify iGiftFund and coordinate with iGiftFund regarding the continued management, transfer, or closure of the investment account.
- Donors retain advisory privileges but do not own or control the assets of a Fund.
- An Advisor may be recommended by a donor but is appointed and approved by iGiftFund to provide investment advisory or brokerage services for assets held in Funds.
- Investments will be managed in accordance with the **iGiftFund Statement of Investment Objectives and Guidelines**, unless a specific exception is approved in writing by iGiftFund.
- iGiftFund retains ultimate authority over the investment and disposition of assets held in Funds and may approve, restrict, or terminate (with or without cause) an Advisor relationship at its discretion.

The Advisor agrees to promptly notify iGiftFund of any circumstances that may affect the Advisor's ability to comply with this Agreement or the **iGiftFund Statement of Investment Objectives and Guidelines.**

ADVISOR NAME	DATE	SIGNATURE
ADVISOR FIRM		

donorsupport@iGiftFund.org | igiftfund.org | Fax: 330.362.9925
110 W Streetsboro St, Ste 2A, Hudson, OH 44236 | Phone: 330.400.2768 / 800.810.0366