

Grant Recommendation Change Form



To change grant information for your TerraTundra Giving Account, please complete this form and send it to the **TerraTundra Foundation** (the "Foundation") at **207 - 517 Wellington St. W., Toronto ON M5V 1G1**. A Grant Recommendation Change Form must be submitted to the Foundation at least 4 weeks prior to the grant payment period you have elected to have grants paid from the Account. **Questions or Need Assistance?** Call 1-855-977-8181.

1 GIVING ACCOUNT INFORMATION

Name of Giving Account	Name of Individual Submitting Change
Dealer Name	Account Number
Advisor Name	Advisor Email

2 GRANT AMOUNT

The Foundation annually grants at a minimum standing rate of 4% or \$500 (whichever is greater). The actual annual grant amount is based on the Account's year-end market value. For example, an Account with a market value of \$100,000 on December 31, 2012 will result in a 4% annual grant amount of \$4,000 in 2013. Please note that although you may make this recommendation, the ultimate granting decision is the responsibility of the Board of Directors of the Foundation.

ANNUAL Please grant at an annual rate of (circle selection): 4% 5% 6% 7% other _____%

ONE-TIME Please grant dollar amount(s) indicated in Section 3 below.

Please note that one-time grants can not exceed amount available in an account. Fees and market fluctuations may also impact dollar amounts available for grants.

3 GRANT RECOMMENDATIONS

Name of Charity (In order of preference. Please attach a 2nd sheet, if required.)	Canada Revenue Agency Charitable Registration Number	Grant Amount (select Dollar OR Percentage)	
		Dollar Amount (min \$500 or more in \$50 increments)	Percentage (must total 100% of Annual Grant Amt)
1		\$	%
2		\$	%
3		\$	%
4		\$	%
5		\$	%

The annual grant recommendations above will remain in effect until the Foundation receives revised grant recommendations. Grant recommendations may be changed by submitting a Grant Recommendation Change Form to the Foundation no later than 4 weeks prior to the grant payment period selected for the Account. Grants are redeemed annually from the account, with an option to choose one grant payment period in a year (see Section 4). If the Foundation has not received revised grant recommendations 4 weeks prior to the selected grant payment period, the annual grant payment will be made from the Account to (i) the remaining eligible charities listed for the account according to the account's order of preference; or (ii) eligible charities selected by the Foundation where an account has no standing grant recommendation listed. Following a grant payment, each charity or charities selected will receive a confirmation from the Foundation. The minimum annual payment to each eligible charity is \$500 subject to the maximum annual amount designated by the Foundation.

4 GRANT PAYMENT PERIOD (Please check **one** box only) July September December

5 GRANT ACKNOWLEDGEMENT

Grants to charities are accompanied by a letter that includes the name of the Account recommending the grant, unless otherwise requested by checking the "anonymous" box below. As a further option, you may also choose to have your contact information disclosed. Please check the applicable box below.

FOUNDATION ACCOUNT NAME ONLY. Please release **ONLY** the name of the Account.

FOUNDATION ACCOUNT NAME & CONTACT INFORMATION. Please release the Account name & name and address of the individual authorized to make grants.

ANONYMOUS. Please do not release any information about this Account.

Optional: Issue the Grants in the Following Name(s): _____

From time to time the Foundation may issue reports that provide details on the program, beneficial charities and/or donors. Please indicate below if you wish to have the contact information from the charitable Account information included in these reports.

DO NOT disclose contact information for Foundation reports

Disclose contact information for Foundation reports

The above grant recommendations and grant acknowledgement options will remain in effect unless you or your delegate request otherwise.

6 ACKNOWLEDGEMENT

The TerraTundra Giving Fund Program (the "Giving Program") is a donor-advised fund program developed by Terra Fund Management Ltd. ("Terra") with TerraTundra Foundation ("Foundation"). The Foundation is a non-profit charitable corporation registered as a public foundation with the Canada Revenue Agency and the Quebec Ministry of Revenue and is governed under the *Income Tax Act* (Canada) (the "Tax Act"). The Foundation has retained Terra to provide certain administrative and other services to the Foundation and the Giving Program. The above grant recommendations and grant acknowledgment options will replace information currently stored on the Giving Account and will remain in effect unless you or your delegate requests otherwise. Grant recommendations and grant acknowledgment options may be changed by submitting a Grant Recommendation Change Form to the Foundation 4 weeks prior to the grant payment period you have elected to have grants paid from the Giving Account.

I acknowledge that the above recommendations are subject to approval by the Foundation. By signing this form below, I hereby confirm that I have read and understand and agree to the terms and conditions as set forth in the Program Guide. If I do not provide sufficient grant recommendations, the Foundation will attempt to contact me to obtain this information. If I fail to provide grant recommendations when required, the Foundation will disburse an amount from the account in accordance with the terms and condition discussed in the Program Guide.

Privacy Policy

By signing this application form, I consent to my personal information being collected, held, used and disclosed by Terra and the Foundation to administer my account. My personal information may be shared with others outside Terra in limited circumstances including but not limited to third party service providers, my financial advisor and dealer and as required or permitted by law. If I have provided information concerning my spouse/partner, delegate and or my successor, I confirm that I am authorized to provide such information. I acknowledge that I may obtain Terra's Privacy Policy by calling toll free 1-888-449-4645 or by visiting www.terrafunds.ca.

Signature of Authorized Donor/Account Holder Delegate	Date
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