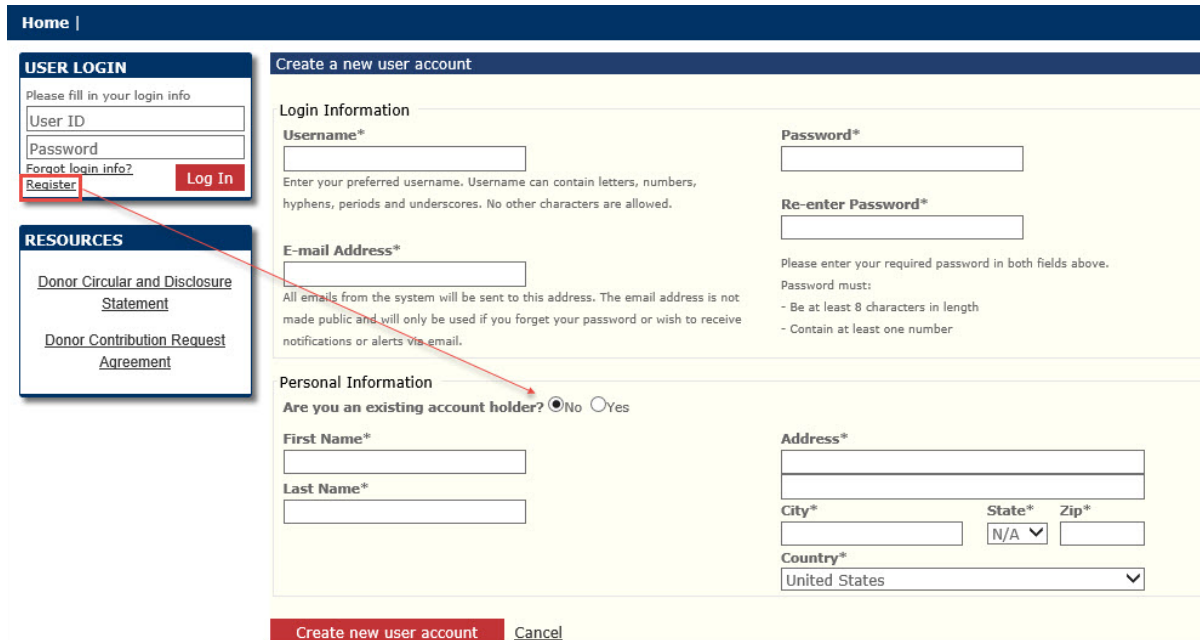


Now that you have reviewed the Donor Circular & Disclosure Agreement under the “Resources” tab, let’s get started in creating a new LDC Donor Advised Fund for you, today!

## 1

### Click the “Register” Link under “User Login”

- ✓ Under “Login Information,” create a username and password, and enter your email address. Refer to the directions underneath each field to identify invalid characters. *Ensure your username is “available” and password is “valid.”*
- ✓ Under “Personal Information,” when asked if you are an existing account holder, click “No.” Proceed to enter your first name, last name, and address.



- ✓ Click the red box below titled “Create new user account.”
- ✓ A pop-up box will appear, alerting you that your new user account has been created successfully. Click “OK” to continue to the home screen.

## 2

### Once registration is complete, “Open New Fund”

- ✓ At the top left, under “Main Menu,” click “Open New Fund.” An electronic form will populate in center screen. Click the blue button titled: “Create New Fund Request.”
- ✓ Complete each tab of the electronic Donor Contribution Agreement form, by clicking “Save & Continue.” *You may click “Save,” to return later to the form under “Open New Fund.”*

## MAIN MENU

Home  
 Fund Summary  
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 Make A Grant  
 Grant History  
 Funding Opportunities  
 My Charities  
 Open New Fund  
 Charge My Credit Card  
 Recurring & Future Grants

## Open New Fund for Morgan Stanley

To initiate a process of creating a new Fund, please click the "Create New Fund Request" button.

Create New Fund Request

- ✓ In center screen, click the blue button titled: "Create New Fund Request."
- ✓ Complete each tab of the electronic Donor Contribution Agreement form, by clicking "Save & Continue." *You may click "Save," to return to the form under "Open New Fund" at a later date.*
- ✓ To add an interested party, click on the blue button "Add a [donor, advisor, or successor]" under the "Interested Parties" tab. Once entering the information, click the same blue button again on the top left, "Add a [donor, advisor, or successor]," before clicking "Save & Continue."
- ✓ When you reach the "Documents" tab, please note that no documents are required for upload
- ✓ Make sure to closely review your application on the "Finalize" tab. Check off that you agree to the terms and conditions outlined on the Donor Circular & Disclosure Statement.
- ✓ Choose to print the application and sign by hand, or, sign electronically.

Terms and Conditions

The assets of my account will be distributed for charitable purposes, and shall be administered pursuant to the Donor Circular and the governing instruments of the Sponsor and Morgan Stanley GIFT as they may be amended from time to time.

I understand that no grants may be made to private foundations, to satisfy a pre-existing pledge, for any private benefit or to support any political campaign activities. I also understand that the Board of Directors of Morgan Stanley GIFT remains the final authority to determine the amount and recipient of any grant and that grant recommendations do not have to be followed.

I Agree

I would like to sign this application electronically.  I would like to print this application and sign by hand.

Signature  Date

(Morgan Stanley) (6/16/2017)

Submit Application

Back Close

- ✓ Click the blue box titled "Submit Application," and you will see the confirmation appear at the bottom of the page "This application has been submitted." You may return to the "Open New Fund" tab to see the status of your submission.

## 3

## Fund your new LDC Donor Advised Fund

- ✓ Once the LDC staff and Morgan Stanley GIFT teams review your application, a donor advised fund will be created in their portal.
- ✓ You will receive a confirmation email with your new account number and transfer instructions, to complete the initial funding of at least \$1,000.00 into your new LDC DAF account.