



**DEVON BANK**

## “Well Rounded” Auto Charitable Donations

### Enrollment Form

Customer Name:

Address:

City/State/Zip:

Telephone:

#### **Auto Donation Transfer:**

By agreeing to the option below, we will round-up the amount of any transaction with your Devon Bank debit card and sweep the amount of change in excess of the purchase price to a charitable fund devoted to one of the following charitable focus areas. These funds are subsidiary accounts of The Loundy Charitable Foundation, an IRS determined 501(c)(3) public charity.

- Support immigration and refugee settlement causes—The Sanctuary Card
- Protect the environment—The Earth Earns Card
- Educational support—The Smarter Card
- Support for the Arts & Sciences—The Dancing Delta Debit Card
- Help the homeless, hunger alleviation, and low income medical care—The Homeless, Hungry, & Healing Card
- Greatest need/endow future charitable endeavors—The Devon Donates Card
- Support peace in our local communities – The Safer Communities Card
- Existing Devon Donor Advised Fund

#### **“Well Rounded” Auto Donation Transfers FROM:** (one Checking Account)

Checking Account Number:

Debit Card Number:

#### Terms & Conditions

To enroll in the service, you will need a Devon Bank Checking Account and a debit card. When you enroll in our “Well Rounded” Auto Donation Service, we round up the amount of any debit card purchase made by you or any cardholder of your Checking Account to the next whole dollar amount in excess of the purchase price, and transfer that amount from your Checking Account to the designated charitable fund of The Loundy Charitable Foundation. The Board of Directors of this Foundation will then make charitable grants to other public charities working within the focus area on a periodic basis.

We round up each purchase that posts to your Checking Account each business day and make equal transfers at the end of the business day. The transfer(s) description on the statement will contain the name of the charity of your choice, selected above. If on a business day you do not have sufficient available funds in your Checking

Account, we do not round up purchases posted on that business day and we cancel the "Well Rounded" Auto Donation Service for that day.

If your debit card purchase is subsequently cancelled or reversed, the corresponding round-up transfer(s) will remain as a completed donation. We may cancel the Round-up transfer service at any time. The "Well Rounded" Auto Donation Transfer Service is available only on debit cards linked to your Devon Bank Checking Account indicated above.

If the Checking Account with the "Well Rounded" Auto Donation Service is closed the Service will be canceled. You agree to notify Devon Bank in writing if you wish to cancel the "Well Rounded" Auto Donation Transfer Service. Near the end of a calendar year we will send you a statement that lists the total of the rounded up amounts you have donated to the designated charitable focus area, provided that the total amount of all Auto Donation amounts equals or exceeds \$10.00. For tax purposes, this statement will list the donation as made to The Loundy Charitable Foundation and not to the end recipient charity.

**Customer Signature:** \_\_\_\_\_

**Date**

<b>BANK USE ONLY</b> Input by: _____ Date: _____
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