

Step by Step

For the Donor:

1. Complete the joinder provided.
 - a. Exhibit A
 - i. Accredited Investor Questionnaire
 1. Individual participants fill out page A-4
 - a. Select either option one or two
 2. Corporate participants fill out page A-5
 - a. Select one of the 9 options
 - ii. Fill out page A-6 in full
 - iii. **Pay close attention to the contribution allocation for individual participation**, and assign an allocation that is proportional to the specific liability generated by each member. Please consult your tax professional if you have questions about what is best for your specific tax situation.
 - iv. Fill out page A-7 in full.
 - b. Exhibit C
 - i. Fill out page C-1 in full.
2. Write a check
 - a. Check must be made out to the SPE/entity listed on the joinder
3. Scan or take a photo with your phone
 - a. This step is optional. But if possible please email an image of the joinder and check to your contact person at: jbowmanlim@frankfordfriends.org
4. Mail or deliver the signed original joinder and check to your contact person:
Frankford Friends School, 1500 Orthodox St., Philadelphia, PA 19124 Attn: Joy Bowman Lim, Development Director
5. You are done! Thank you for your gift!