

DONOR-ADVISED FUND SUCCESSOR ADVISOR AND DISPOSITION OF ASSETS



FUND NAME _____ **FUND NUMBER** _____

Please make the following additions/changes to my Fund:

DISPOSITION OF DONOR-ADVISED FUND ASSETS

After the death, resignation, or inability to act of the last of the named Fund Advisor(s), any remaining Fund assets shall be disposed of as provided below:

The Federation's Annual Campaign

I would like to make the following one-time gift to the Federation's Annual Campaign: \$ _____

PACE/LOJE Funds*

I would like to designate \$ _____ to establish a PACE/LOJE** in my name, which will serve to endow my lifetime giving to the Federation's Annual Campaign.

* Perpetual Annual Campaign Endowment/Lion of Judah Endowment ** \$100,000 minimum to establish a LOJE

Donor-Advised Fund Successor Advisor Election (Optional)

Fund Advisors may create a succession plan for the fund by appointing Successor Advisors. Successor Advisors assume the privilege to advise a fund only after all of the initial Fund Advisors are unwilling or unable to exercise their privilege to do so. Please refer to the Policies and Procedures for additional information and eligibility requirements.

I wish to name the following as Successor Advisors for my Fund:

Name: _____

Name: _____

Address: _____

Address: _____

City, ST, ZIP: _____

City, ST, ZIP: _____

Cell Phone: _____

Cell Phone: _____

Alt Phone: _____

Alt Phone: _____

Email: _____

Email: _____

Birthdate: _____

Birthdate: _____

Relationship to Fund Advisor: _____

Relationship to Fund Advisor: _____

If no Successor Advisor is named, after the above requested distributions, the balance shall become a part of the unrestricted Endowment Fund of the Federation.

ESTATE GIFTS & LEGACY PLANNING

I have remembered the Federation in my estate plans.

I would like more information on how to include the Federation in my estate plans.

Fund Advisor Name: _____

Fund Advisor Name: _____

Fund Advisor Signature: _____

Fund Advisor Signature: _____

Accepted By:

Federation Name: _____

Federation Title: _____

Federation Signature: _____

Date: _____