

# 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: \_\_\_\_\_