

**BAY AREA**

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

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.

**GRANTS (for more than five grants, please attach another page)**

<b>Organization Name</b>	<b>Amount</b>	<b>Purpose</b>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**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. Successor Advisors will advise the fund after the above requested distributions (if any) are completed. 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, State, ZIP: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

Birthdate: \_\_\_\_\_

Birthdate: \_\_\_\_\_

Relationship to Fund Advisor: \_\_\_\_\_

Relationship to Fund Advisor: \_\_\_\_\_

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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.

Fund Advisor Name: \_\_\_\_\_

Fund Advisor Name: \_\_\_\_\_

Fund Advisor Signature: \_\_\_\_\_

Fund Advisor Signature: \_\_\_\_\_

Accepted By:

Federation Name: \_\_\_\_\_

Federation Title: \_\_\_\_\_

Federation Signature: \_\_\_\_\_

Date: \_\_\_\_\_

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