

SUCCESSOR APPOINTMENT



JEWISH COMMUNITY FOUNDATION
LOS ANGELES

For this generation...and generations to come.

DONOR ADVISED FUND (DAF) NAME:

Your Donor Advised Fund may be used to establish a legacy of giving that will last for generations.

Please **choose one or more of five Successor Options** and **indicate your Successor Allocation:**

(1) Successor Recommender, (2) Successor Charity, (3) Successor Endowment, (4) The Foundation’s Permanent Legacy Fund or (5) The Foundation’s Israel Grants.

Option 1 - Successor Recommender. A successor recommender assumes all the privileges of recommendation following the death of the last remaining Account Holder. If there are multiple successors, assets will be divided equally to establish separate DAFs for each successor. A Successor Recommender may designate his or her own successors. Successor DAFs must be funded with a minimum of \$5,000. Successors with an allocated balance under \$5,000 have one year to make additional contributions to reach the \$5,000 minimum or to recommend grants equal to the allocated balance. If a successor (or a legal guardian in the case of a minor) does not exercise either option, the balance will transfer to The Foundation’s Permanent Legacy Fund. Successor recommenders must be 18 years or older to make recommendations or must recommend via a legal guardian. Attach additional sheets if necessary.

_____ Name of Successor Recommender
_____ Birthdate
_____ Relationship to Donor
_____ Business Name
_____ Business Address
_____ City State Zip ()
_____ Business Phone
_____ Home Address
_____ City State Zip ()
_____ Home Phone ()
_____ Cell Phone
_____ Email

_____ Name of Successor Recommender
_____ Birthdate
_____ Relationship to Donor
_____ Business Name
_____ Business Address
_____ City State Zip ()
_____ Business Phone
_____ Home Address
_____ City State Zip ()
_____ Home Phone ()
_____ Cell Phone
_____ Email

Option 2 - Successor Charity. You may recommend IRS-qualified public charities to receive the DAF balance following the death of the last remaining Account Holder. If a named entity is no longer a qualified grant recipient at the time of distribution, the portion designated for that entity will be distributed to The Foundation’s Permanent Legacy Fund.

Name of Successor Charity 1	Name of Successor Charity 2
Address	Address
City State Zip	City State Zip
()	()
Phone	Phone

Option 3 - Successor Endowment. You may establish a successor endowment to support IRS-qualified public charities or fields of interest in perpetuity following the death of the last remaining Account Holder. \$10,000 minimum balance required at the time of succession. If you select this option, we will contact you to customize an endowment agreement for you. If the \$10,000 minimum is not met, the balance will be distributed in a one-time, lump sum grant to the fields of interest or named charities in the agreement. If a named charity is no longer a qualified grant recipient at the time of any distribution, the portion designated for that charity will be distributed pursuant to the agreement.

Option 4 - The Foundation’s Permanent Legacy Fund. By designating The Foundation’s Permanent Legacy Fund as your DAF successor, you will support The Foundation’s Cutting Edge Grants (New and Innovative Programs in Jewish L.A.), Next Stage Grants (Capacity Building for Jewish L.A.), General Community Grants (Helping Angelenos in Need), and Capital Grants (Building Jewish L.A.). To view a list of grant recipients, visit www.jewishfoundationla.org/grantsawarded.

Option 5 - The Foundation’s Israel Grants. By designating The Foundation’s Israel Grants as your DAF successor, you will support The Foundation’s Israel Grants (Economic Development and Pluralistic Jewish Identity). To view a list of grant recipients, visit www.jewishfoundationla.org/grantsawarded.

SUCCESSOR ALLOCATION

Your allocation must total 100%. Indicate below or submit other written instructions.

			% of Fund to Successor Recommender(s)
			% of Fund to Successor Charity 1
			% of Fund to Successor Charity 2
			% of Fund to Successor Endowment
			% of Fund to The Foundation’s Permanent Legacy Fund
			% of Fund to The Foundation’s Israel Grants

100 %

ACKNOWLEDGEMENTS AND SIGNATURES

I/we understand that if there is no successor designation on file at the Jewish Community Foundation of Los Angeles at the time of the death of the last remaining Account Holder, the fund balance will be transferred to The Foundation's Permanent Legacy Fund. I/we understand that this Successor Appointment may be revoked or amended at any time by submitting a new form or other written instructions.

Donor Printed Name	Signature	Date
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Donor Printed Name	Signature	Date
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Please mail, fax or email this completed form to:

JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

Attn: Heather Baroff

6505 Wilshire Boulevard, Suite 1200

Los Angeles, CA 90048

Fax: 323-761-8720

Email: hbaroff@jewishfoundationla.org

Phone: Heather Baroff, Manager, Donor Relations at 323-761-8734

www.jewishfoundationla.org



For this generation...and generations to come.

-----For Office Use Only -----

ACCEPTED FOR JEWISH COMMUNITY FOUNDATION OF LOS ANGELES

By: _____
Name: _____
Title: _____
Date: _____