

# Donor Advised Fund Agreement

## Successor Appointment

DONOR ADVISED FUND (DAF) NAME

FUND NUMBER

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

NAME OF SUCCESSOR RECOMMENDER

BIRTHDATE

BIRTHDATE

RELATIONSHIP TO DONOR

RELATIONSHIP TO DONOR

HOME/PRIMARY ADDRESS

HOME/PRIMARY ADDRESS

CITY STATE ZIP

CITY STATE ZIP

BUSINESS/SECONDARY ADDRESS

BUSINESS/SECONDARY ADDRESS

CITY STATE ZIP

CITY STATE ZIP

HOME/PRIMARY PHONE

HOME/PRIMARY PHONE

BUSINESS/SECONDARY PHONE

BUSINESS/SECONDARY PHONE

EMAIL

EMAIL

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- 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. Please use additional sheets if necessary.

NAME OF SUCCESSOR CHARITY 1

NAME OF SUCCESSOR CHARITY 2

EIN/TAX ID

EIN/TAX ID

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. \$25,000 minimum balance is required at the time of succession. If you select this option, we will contact you to customize an Endowment Agreement for you. If the \$25,000 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, 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.) and General Community Grants (Helping Angelenos in Need). To view a list of grant recipients, visit [www.jewishfoundationla.org/grantees](http://www.jewishfoundationla.org/grantees).
- 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. To view a list of grant recipients, visit [www.jewishfoundationla.org/grantees](http://www.jewishfoundationla.org/grantees).

## Successor Allocation

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

<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to Successor Recommender(s)
<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to Successor Charity 1
<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to Successor Charity 2
<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to Successor Endowment
<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to The Foundation’s Permanent Legacy Fund
<input type="text"/>	<input type="text"/>	<input type="text"/>	% of Fund to The Foundation’s Israel Grants

**100%**

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## Acknowledgment and Signatures

I acknowledge that I have read the Jewish Community Foundation's Terms and Conditions and agree to the terms and conditions described therein. I understand any contribution, once accepted by the Jewish Community Foundation's Board of Trustees, represents an irrevocable gift to the Jewish Community Foundation.

The Jewish Community Foundation Board of Trustees has variance power under IRS regulations, and this gift is not refundable to me.

I hereby certify, to the best of my knowledge, that all information presented within this form is accurate, and I will notify the Jewish Community Foundation promptly of any changes.

FUND NUMBER:

\_\_\_\_\_  
PRIMARY FUND ADVISOR SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
DATE

\_\_\_\_\_  
FUND ADVISOR SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
DATE

\_\_\_\_\_  
THE JEWISH COMMUNITY FOUNDATION AUTHORIZED SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
DATE ACCEPTED

SPECIAL INSTRUCTIONS:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_