

# Donor Advised Fund 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) Permanent Legacy Fund, (2) Israel Grants, (3) Successor Endowment, (4) Successor Charity and or (5) Successor Recommender.

- Option 1 – Permanent Legacy Fund.** By designating the Permanent Legacy Fund as your DAF successor, your legacy will support The Foundation’s future as an essential community institution, helping to build long-term sustainable funding for communal needs in the Jewish and Broader Los Angeles community including education, arts & culture, efforts to combat antisemitism, and critical social services such as poverty & basic needs, mental and physical health support, and financial stability.
- Option 2 – Israel Grants.** By designating Israel Grants as your DAF successor, your fund’s legacy will support The Foundation’s enduring Israel grantmaking—addressing the country’s most urgent needs from mental health and trauma support, to expanding economic opportunity, and strengthening culture and Jewish identity.
- 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. 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 – Successor Charity.** You may recommend IRS-qualified public charities to receive the DAF balance following the death of the last remaining Fund 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 5 – Successor Recommender.** A successor recommender assumes all the privileges of recommendation following the death of the last remaining Fund 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 will 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 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.

# Donor Advised Fund Successor Appointment

NAME OF SUCCESSOR RECOMMENDER

BIRTHDATE

RELATIONSHIP TO DONOR

HOME/PRIMARY ADDRESS

CITY STATE ZIP

BUSINESS/SECONDARY ADDRESS

CITY STATE ZIP

HOME/PRIMARY PHONE

BUSINESS/SECONDARY PHONE

EMAIL

NAME OF SUCCESSOR RECOMMENDER

BIRTHDATE

RELATIONSHIP TO DONOR

HOME/PRIMARY ADDRESS

CITY STATE ZIP

BUSINESS/SECONDARY ADDRESS

CITY STATE ZIP

HOME/PRIMARY PHONE

BUSINESS/SECONDARY PHONE

EMAIL

## Successor Allocation

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

% of Fund to The Foundation's Permanent Legacy Fund

% of Fund to The Foundation's Israel Grants

% of Fund to Successor Endowment

% of Fund to Successor Charity 1

% of Fund to Successor Charity 2

% of Fund to Successor Recommender(s)

**100%**