

Donor Advised Fund Succession Designation Form

Use this form to designate how the remaining assets in your Donor Advised Fund (DAF) should be distributed or managed after the lifetime of the last surviving donor/advisor. Please print, sign, and return this form to the fund administrator.

Section 1: Fund Information

Donor Advised Fund Name:

Fund Account Number:

Primary Donor Name:

Co-Donor Name (if applicable):

Section 2: Succession Options

Select only **one** of the options below by filling out the corresponding section (Option A or Option B).

Option A: Appoint Successor Advisors

Appoint one or more individuals to succeed you as advisors to the fund. If naming multiple successors, they will advise the fund jointly unless otherwise specified.

Successor Advisor 1

Full Name: Relationship:

Address:

Phone Number: Email Address:

Allocation Percentage: % (Total must equal 100% across all successors)

Successor Advisor 2

Full Name: Relationship:

Address:

Phone Number: Email Address:

Allocation Percentage: %

Option B: Ultimate Charitable Distribution

Recommend that all remaining fund assets be distributed directly to the following eligible 501(c)(3) public charities upon your passing.

Charitable Organization 1

Organization Name:

Tax ID / EIN: Allocation Percentage: %

Address:

Contact Person (Optional):

Charitable Organization 2

Organization Name:

Tax ID / EIN: Allocation Percentage: %

Address:

Contact Person (Optional):

Section 3: Authorization and Signatures

By signing below, I/we hereby revoke any prior successor or charitable distribution designations and request that the fund administrator record the designations set forth on this form.

Primary Donor Signature: (Sign when
printed) Date (MM/DD/YYYY):

Co-Donor Signature (if applicable): (Sign when
printed) Date (MM/DD/YYYY):