

# Community Foundation Endowment Fund Agreement

This Agreement is established to define the terms and conditions for creating an endowment fund within the Community Foundation. Please complete all sections below to finalize the establishment of the fund.

## 1. Donor Information

Donor Name(s):

Primary Contact Person:

Mailing Address:

Phone Number:

Email Address:

## 2. Fund Details

Proposed Fund Name:

Fund Type (e.g., Donor Advised, Designated, Field of Interest, Unrestricted):

## 3. Initial Contribution

Initial Gift Amount / Asset Description:

Source of Gift (e.g., Cash, Publicly Traded Securities, Real Estate):

## 4. Distributive Purpose and Administration

Please describe the specific charitable purposes, organizations, or fields of interest that this endowment fund is intended to support:

## 5. Succession and Future Advising

Indicate succession plans for the fund (e.g., successor advisors, transfer to unrestricted endowment, specific successor charities):

Successor Advisor Name(s):

Successor Contact Information:

## 6. Acknowledgments and Signatures

By signing below, the Donor(s) and the Community Foundation agree to the terms set forth in this Agreement, subject to the Foundation's governing documents and policies.

### Donor Signature

Donor Signature:  Date:

Co-Donor Signature (if applicable):  Date:

### Community Foundation Representative Signature

Representative Name & Title:

Representative Signature:

Date: