**Opening a Donor Advised Fund**

We’re honored to partner with you in your philanthropy by creating a customized donor advised fund just for you. With the information below, we will create a Donor Advised Fund agreement for you to sign. Once that’s signed and your gift is made, you’re ready to go!

We’ll send you materials about getting onto the online grantmaking platform and how to make the most use of your fund, and we’d love to meet with you and your family to talk about your philanthropic goals and how we can help.

**Fund Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*The fund can be named in whatever way you would like. It can be as simple as YOUR NAME Family Fund, or something creative and meaningful to you.*

**Donor Advisors**

You can have multiple advisors to your fund, who are all able to recommend grants from the fund to charities based on the guidelines set forth in your fund agreement. If you would prefer to limit this list to just yourself, that is fine as well.

Donor Advisors to the Fund: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact information (if not already on file): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Succession**

After you pass away, your fund will continue on. You may specify a next generation of advisors from your family. After that, most funds go to the unrestricted pool for the benefit of the Jewish community as it evolves over time. If you prefer, you may identify a particular beneficiary organization that you would like to receive the funds.

Succession Instructions (including names and contact information for successor advisors, if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special Instructions:**

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