

Succession Plan Agreement for Donor-advised Funds

Welcome to the Community Foundation family. Thank you for choosing the Community Foundation for Greater Atlanta. Our staff is available to assist you at any time with a wide variety of services from creating your fund to ongoing grantmaking and charitable giving services.

This document is intended to inform the Community Foundation of your desires regarding the succession plan of your fund after your death. If you have any questions about this agreement, please call our philanthropic services department at 404.688.5525.

1 DONOR-ADVISED FUND NAME

Fund name: _____

2 SUCCESSION PLAN

You may request that portions of your fund be administered in any or all of the following ways upon the death or incapacity of the fund's last surviving donor advisor. Total of percentages must equal 100.

- Transfer the fund's assets to the Community Foundation's unrestricted operating fund to help support the ongoing activities of the Community Foundation
 % of fund value
- Provide advisory privileges of the fund to successor advisor(s) as listed later in this agreement
 % of fund value
- Create a designated fund for the benefit of the nonprofit organization(s) named below
 % of fund value permanent fund spend out over years

Organization:	<input type="text"/>	<input type="text"/> %
Organization:	<input type="text"/>	<input type="text"/> %
Organization:	<input type="text"/>	<input type="text"/> %

(if more, please add a page)
- Create a named unrestricted fund to help meet the greatest needs of the metro Atlanta area.
 % of fund value
- Create a field of interest fund to help meet the greatest needs of the Greater Atlanta area in a specified field. All new field of interest funds must be pre-approved by the Community Foundation staff. (example: women, girls, homelessness)
 % of fund value Field:
- Distribute % of fund value proceeds to the following nonprofit organizations:

Organization:	<input type="text"/>	<input type="text"/> %
Organization:	<input type="text"/>	<input type="text"/> %
Organization:	<input type="text"/>	<input type="text"/> %

Succession Plan Agreement for Donor-advised Funds *(continued – p2 of 3)*



Successor Advisors

Donors may designate individuals as successor advisor(s), who have privileges to make recommendations appropriate for the fund. A donor advisor may change this designation at any time by completing a new Succession Plan Agreement.

Successor Advisor Information

All fund correspondence will be sent to successor advisor 1, unless otherwise specified. If more than two advisors are desired, please attach additional information to this form. Furthermore, it is the responsibility of the designated successor advisor(s) to contact the Foundation at such time as he/she/they become donor advisor(s) to the fund.

Successor Advisor 1

Full name <i>(First, Middle, Last)</i>		Nickname	Preferred salutation <i>(e.g. Mr. James L. Smith or Jim Smith)</i>	
Home address		City	State	Zip
Date of birth	Send mailings to: <input type="checkbox"/> Home <input type="checkbox"/> Office		Add to mailing list for: <input type="checkbox"/> Invite to events <input type="checkbox"/> Send statement copies	
Business or organization name		Position		
Business address		City	State	Zip
Home phone	Mobile phone	Business phone	E-Mail <i>(Preferred)</i>	
Relationship with donor advisor				

Successor Advisor 2

Full name <i>(First, Middle, Last)</i>		Nickname	Preferred salutation <i>(e.g. Mr. James L. Smith or Jim Smith)</i>	
Home address		City	State	Zip
Date of birth	Send mailings to: <input type="checkbox"/> Home <input type="checkbox"/> Office		Add to mailing list for: <input type="checkbox"/> Invite to events <input type="checkbox"/> Send statement copies	
Business or organization name		Position		
Business address		City	State	Zip
Home phone	Mobile phone	Business phone	E-Mail <i>(Preferred)</i>	
Relationship with donor advisor				

I/We, as the donor(s), request that the successor advisor(s) named assume this responsibility on the following date ____/____/____
 on the death of the current advisor(s)

I/We, as the donor(s), request that the fund be: maintained in one fund split evenly between successor advisors
 successor advisors have discretion to split the fund special instructions attached

Succession Plan Agreement for Donor-advised Funds *(continued – p3 of 3)*

3 PROFESSIONAL ADVISOR

If you are working with a financial, tax or estate planning advisor to structure the succession plan to your fund, please complete the following:

[]		[]	
Advisor name	Firm name		
[]	[]	[]	[]
Business address (line 1)	City	State	Zip
[]	[]	[]	[]
Business address (line 2)	Business phone	E-Mail	
[]	[]	[]	

4 SIGNATURES

Fund Advisor	[]		
	Signature		
Fund Advisor	[]		[]
	Name <i>(please print)</i>		Date
Fund Advisor	[]		
	Signature		
Fund Advisor	[]		[]
	Name <i>(please print)</i>		Date
Community Foundation for Greater Atlanta	[]		[]
	By		Title
Community Foundation for Greater Atlanta	[]		[]
	Name <i>(please print)</i>		Date

- Have you created an estate or deferred gift to add to your fund after your lifetime? Yes No
- Do you want to talk to our director of gift planning about adding to your fund through an estate or deferred gift? Yes No