

Succession Plan Agreement for a Donor-advised Fund

WELCOME TO THE COMMUNITY FOUNDATION FAMILY

Thank you for choosing the Community Foundation for Greater Atlanta. Our team 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 philanthropy team at 404.688.5525.

1 Donor-advised fund name

Fund name: _____

2 Succession plan

You may request that portions of your planned gift be administered in any or all of the following ways. Total of percentages must equal 100.

Transfer the planned gift to the Community Foundation's unrestricted operating fund to help support the ongoing activities of the Community Foundation

% of fund value

Create or add to a donor-advised fund for 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
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Organization:	%
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Organization:	%
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Organization:	%
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(if more, please add a page)

Create a named unrestricted Common Good 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.

% of fund value Field:

Distribute % of the planned gift proceeds to the following nonprofit organizations:

Organization:	%
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Organization:	%
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Organization:	%
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Succession 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:	Home	Office	Add to mailing list for:	Invite to events	Send statement copies
Business or organization name		Position				
Business address		City	State	Zip		
Preferred phone		Preferred Email				
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:	Home	Office	Add to mailing list for:	Invite to events	Send statement copies
Business or organization name		Position				
Business address		City	State	Zip		
Preferred phone		Preferred Email				
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



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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	Email	

4

Signatures

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