



Today's Date: _____
 Fund Name: _____
 Donor Advisor(S) Name: _____

I WANT TO (check all that apply):

- Change the name of my fund: **New Fund Name** _____
 Add or change existing fund advisors Add or change successor advisors
 Change my succession plan Other _____

Add or Change Existing Fund Advisors

Please list the names and contact information of advisor (including yourself) who are authorized to make grant recommendations from the fund:

Advisor 1:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Advisor 2:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Advisor 3:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Advisor 4:	_____	_____	_____	_____
	Name	Address	Telephone	Email

Add or Change Successor Fund Advisors

Please list the names and contact information of successor advisors who will be authorized to make recommendations from the fund:

Successor Advisor 1:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Successor Advisor 2:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Successor Advisor 3:	_____	_____	_____	_____
	Name	Address	Telephone	Email
Successor Advisor 4:	_____	_____	_____	_____
	Name	Address	Telephone	Email

New Succession Plan

You may request that portions of your Gift Fund be administered in any or all of the following ways upon the death or incapacity of the Fund's last surviving Donor Advisor:

- Transfer the Fund's assets to OJCF Community Endowment Fund to ensure the survival of the local Jewish community.
 Transfer the Fund's assets to the Foundation's Operating Endowment Fund to help strengthen Foundation operations.
 Transfer advisory privileges of this Fund to my Successor Advisor(s).
 Create an Endowed Fund for the benefit of the organization(s) named below *(Total of percentages should equal 100 - attach additional sheet if necessary):* _____

Signature of Donor Advisor

Signature of Donor Advisor