

DONOR ADVISED FUND AGREEMENT

UNITED JEWISH COMMUNITY OF THE VIRGINIA PENINSULA ENDOWMENT

NAME OF FUND

Please choose a name for your fund:

This can be your family name or a neutral name (for example: "Smith Family Fund" or "Youth Fund")

CONTACT INFORMATION

Fund Advisor(s): Individual(s) has(have) full advisory privileges over a fund, including grant recommendations, naming of successor advisors, and other fund administration advisory privileges.

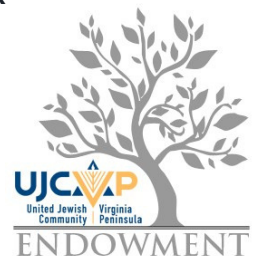
First Name	:	<input type="text"/>	First Name	:	<input type="text"/>
Last Name	:	<input type="text"/>	Last Name	:	<input type="text"/>
Address	:	<input type="text"/>	Address	:	<input type="text"/>
City, State, Zip	:	<input type="text"/>	City, State, Zip	:	<input type="text"/>
Mobile Phone	:	<input type="text"/>	Mobile Phone	:	<input type="text"/>
Secondary Phone	:	<input type="text"/>	Secondary Phone	:	<input type="text"/>
E-Mail	:	<input type="text"/>	E-Mail	:	<input type="text"/>

FUND CREATION

Initial Gift: \$

- Cash or check (made payable to the UJCVP Endowment)
- Publicly Traded Securities
- Privately Held Securities
- Restricted Securities
- Wire Transfer

Other - Please contact us for complex transactions



United Jewish Community of the Virginia Peninsula Endowment, Inc.

401 City Center Blvd
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RECOGNITION AND THANKS

How would you like to be recognized?

Each grant made from a donor advised fund is mailed with a custom grant award letter. Specify below how you would like the name(s) of the fund advisors to appear in the custom grant award letter. (For example, "Mr. and Mrs. Smith", "John and Jane Smith", "The Smith Family")

Please make all grants from the fund anonymous.

How would you like to be thanked by nonprofits?

An organization that has received grants from the fund may wish to send information to you directly. Please indicate your contact preference for the custom grant letter.

Choose one:

- Provide my mailing address
- Provide my email address
- Do not provide any contact information

Mail received by the UJCVP Endowment for your fund will not be forwarded.

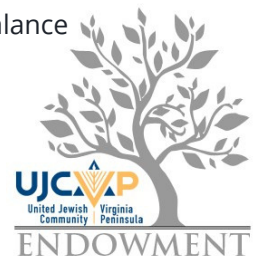
SUCCESSOR APPOINTMENT

Your Donor Advised Fund may be used to establish a legacy of giving that will last for generations.

Please choose one or more of five Successor options and indicate your Successor allocation: (1) Successor Recommender, (2) PACE Fund, (3) Successor Charity, (4) Successor Endowment, (5) Unrestricted Fund

Option 1 - Successor Recommender

A successor recommender assumes all the privileges of recommendation following the death of the last remaining Account Holder. A Successor Recommender may designate his or her own successors. Successor DAFs must be funded with a minimum of \$10,000. Successors with an allocated balance under \$10,000 have one year to make additional contributions to reach the minimum or to recommend grants equal to the remaining balance. If the successor does not exercise either option, the balance will transfer to the Unrestricted Fund.



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Successor Recommender Contact Information:

First Name	:	<input type="text"/>	First Name	:	<input type="text"/>
Last Name	:	<input type="text"/>	Last Name	:	<input type="text"/>
Address	:	<input type="text"/>	Address	:	<input type="text"/>
City, State, Zip	:	<input type="text"/>	City, State, Zip	:	<input type="text"/>
Mobile Phone	:	<input type="text"/>	Mobile Phone	:	<input type="text"/>
Secondary Phone	:	<input type="text"/>	Secondary Phone	:	<input type="text"/>
E-Mail	:	<input type="text"/>	E-Mail	:	<input type="text"/>

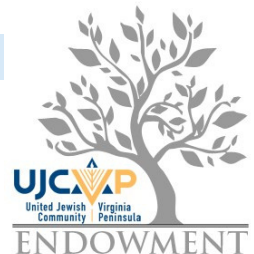
Option 2 - PACE Fund to Support UJCVP

You may establish a Perpetual Annual Campaign Endowment fund in your name. This fund benefits the annual campaign of the United Jewish Community of the Virginia Peninsula, Inc. within the spending policy formula.

Option 3 - Successor Charity

You may recommend IRS-qualified public charities to receive the DAF balance following the death of the last remaining Account Holder. If a named entity is no longer a qualified grant recipient at the time of distribution, the portion designated for that entity will be distributed to Unrestricted Fund. Please use additional sheets if necessary.

Charity 1 Name	:	<input type="text"/>	Charity 2 Name	:	<input type="text"/>
EIN/Tax ID	:	<input type="text"/>	EIN/Tax ID	:	<input type="text"/>
Address	:	<input type="text"/>	Address	:	<input type="text"/>
City, State, Zip	:	<input type="text"/>	City, State, Zip	:	<input type="text"/>
Phone	:	<input type="text"/>	Phone	:	<input type="text"/>



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Charity 3 Name :	<input type="text"/>	Charity 4 Name :	<input type="text"/>
EIN/Tax ID :	<input type="text"/>	EIN/Tax ID :	<input type="text"/>
Address :	<input type="text"/>	Address :	<input type="text"/>
City, State, Zip :	<input type="text"/>	City, State, Zip :	<input type="text"/>
Phone :	<input type="text"/>	Phone :	<input type="text"/>

Option 4 - Unrestricted Fund

By designating the Endowment's Unrestricted Fund as your DAF successor, you will support the ongoing grant programs of the Endowment.

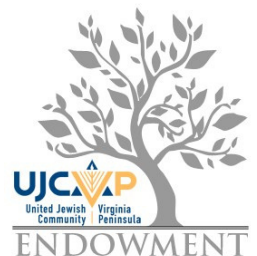
Option 5 - Successor Endowment

You may establish a successor endowment to support IRS-qualified public charities or fields of interest in perpetuity following the death of the last remaining Account Holder. \$25,000 minimum balance is required at the time of succession. If you select this option, we will contact you to customize an Endowment Agreement for you. If the \$25,000 minimum is not met, the balance will be distributed in a one-time, lump sum grant to the fields of interest or named charities in the agreement. If a named charity is no longer a qualified grant recipient, the portion designated for that charity will be distributed pursuant to the agreement.

SUCCESSOR ALLOCATION

Your allocation must total 100%. Indicate below or submit other written instructions.

<input type="text"/>	% of Fund to Successor Recommender(s)
<input type="text"/>	% of Fund to PACE Fund to Support UJCVP
<input type="text"/>	% of Fund to Successor Charity 1
<input type="text"/>	% of Fund to Successor Charity 2



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<input style="width: 100%;" type="text"/>	% of Fund to Successor Charity 3
<input style="width: 100%;" type="text"/>	% of Fund to Successor Charity 4
<input style="width: 100%;" type="text"/>	% of Fund to Unrestricted Fund
<input style="width: 100%;" type="text"/>	% of Fund to Successor Endowment Fund

100%

ACKNOWLEDGEMENT AND SIGNATURES

I acknowledge that I have read the United Jewish Community of the Virginia Peninsula Endowment’s Terms and Conditions and agree to the terms and conditions described therein. I understand any contribution, once accepted by the Endowment’s trustees, represents an irrevocable gift to the Endowment.

The Endowment Board of Trustees has variance power under IRS regulations, and this gift is not refundable to me.

I hereby certify, to the best of my knowledge, that all information presented within this form is accurate, and I will notify the Endowment promptly of any changes.

Advisor Name Print <input style="width: 95%;" type="text"/>	Advisor Name Print <input style="width: 95%;" type="text"/>
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Advisor Signature <input style="width: 95%;" type="text"/>	Advisor Signature <input style="width: 95%;" type="text"/>
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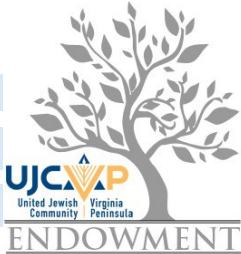
Date <input style="width: 95%;" type="text"/>	Date <input style="width: 95%;" type="text"/>
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Board President Name Print

Board President Signature

Date

Special Instructions



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YOUR ESTATE PLANS

If your estate plans include a gift to your fund at the UJCVP Endowment, or you are interested in exploring this option, please notify the Endowment below. This information will help with the development of the succession plan for your fund. You may check more than one box.

- I do not plan to add additional assets to my fund through my estate.
- I have arranged for a contribution to be made to my fund through my estate.
Expected contribution value \$; asset type
- I have named my fund as a beneficiary for my retirement assets, insurance policy, and/or CRT
Expected contribution value \$

TERMS AND CONDITIONS

Tax Status of Contribution

A Donor Advised Fund ("Fund") established at the United Jewish Community of the Virginia Peninsula Endowment ("The Endowment") is a component fund of The Endowment, a Section 501(c)(3) public benefit corporation. All contributions to The Endowment's funds are treated as gifts to a public charity and are generally tax-deductible, subject to individual limitations. The Endowment does not provide tax or legal advice; we recommend consulting a professional advisor with questions about a gift to The Endowment. This agreement shall be interpreted in a manner consistent with the foregoing intention and so as to conform to the requirements of Section 501(c)(3) of the Internal Revenue Code of 1986 and any regulations issued pursuant thereto. The Endowment is authorized to amend this agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. References to the provision of the Internal Revenue Code of 1986 shall be deemed references to the corresponding provisions of any future Internal Revenue Code.



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TERMS AND CONDITIONS

Ownership of Assets

The Endowment owns the assets in each Donor Advised Fund outright and has complete authority and control over them for the charitable purposes of The Endowment. The records of The Endowment, however, show the dollar value of the assets in each Fund under a name designated by the Donor. The Fund shall be the property of The Endowment held by it in its normal corporate capacity; it shall not be deemed a trust fund held by it in a trustee capacity. The Endowment shall have the ultimate authority and control over all property in the Fund, and the income derived therefrom, for The Endowment's charitable purposes. Certain contributions other than cash or marketable securities must first be approved by The Endowment. The Endowment has the right to reject the donation of assets not readily marketable or subject to liabilities. Examples of those assets are restricted stock, securities of closely held corporations, partnership interests, real estate, and notes secured by trust deeds or mortgages. The Donor does not have any power to restrict the absolute rights of The Endowment as owner of assets in the Donor Advised Fund to deal with or to use those assets for The Endowment's charitable purposes.

Investment of Assets

In making a gift to The Endowment, donors give up all right, title and interest to the assets contributed. The Board of Trustees and Investment Committee of The Endowment have the right to make any or all investment decisions regarding gifts received.

The Endowment may limit the amounts that may be invested in any particular investment. The Endowment reserves the right to revise or revoke at any time, or to change investment objectives and policies of the Fund, without notice to the Donor, and without the Donor's prior approval. There are market risks with respect to any investment and there can be no assurance against risk of loss. All income and capital gains or losses will be allocated to the Fund on a monthly basis.

Fees and Minimums

There is no set-up fee to open a Fund at The Endowment, however a \$10,000 minimum gift is required to open a Fund. The Fund shall be charged an annual fee of .7% of the market value of the Fund (allocated monthly) to cover the cost of administration. Any unrelated business taxable income (UBTI) tax incurred in connection with any Fund asset will be charged to the Fund. The Endowment reserves the right to change its fee or minimum policies at any time.



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TERMS AND CONDITIONS

Grant and Giving Philosophy

List of Charitable Needs

The following are categories of specific charitable needs consistent with the purposes of the Endowment as determined by the Board of Directors of the Endowment. Since unanticipated and unusual needs may arise, it may be necessary to make exceptions to or modifications of the following listed needs, including, but not limited to, emergency situations or innovative projects determined by the Endowment as most deserving of support at the time. Further, in view of the necessity to meet changing conditions and to adjust the current responsibilities, the current categories of specific charitable needs may be changed, from time to time, as determined by the Trustees of the Endowment.

Needs by Categories and Organizations

- A. United Jewish Community of the Virginia Peninsula Endowment, Inc., United Jewish Community of the Virginia Peninsula, Inc.;
- B. Organizations in and outside the United States serving Jewish charitable purposes;
- C. Charitable organizations primarily serving the Tidewater/Hampton Roads, Virginia area in the fields of education, intergroup relations, civic, cultural, health service and social service;
- D. Charitable organizations inside and outside of the Tidewater/Hampton Roads, Virginia area that advance social welfare, medical, education and cultural fields inside and outside of the Jewish Community.

Grant Disbursement Procedures

Most grant recommendations to organizations formed as a 501(c)(3) public charity or verified charitable entity (e.g. schools, religious institutions) will be permitted as detailed above. All grants outside of the United States must be made through an approved United States fiscal sponsor. Grant recommendations are only advisory and The Endowment shall not be bound by such recommendation.

In compliance with the Internal Revenue Code, grants shall not be made or approved for any of the following: grants to individuals; grants to private, non-operating foundations; grants that are not for charitable purposes; grants that give impermissible benefits to the fund donor, fund advisor, or any third party; grants for lobbying purposes or to support political campaigns; or grants that support anti-Semitism. Impermissible benefits would include memberships, event tickets, registration fees in tournaments, and cause-related marketing activities. Grants cannot be made to discharge or satisfy a legally enforceable obligation of any person. The IRS also prohibits grants for the deductible portion of a charity-sponsored event.



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Grants recommendations must be for a minimum of \$100. Grant checks are sent directly to the organizations and are accompanied by a letter from The Endowment specifying the name of the Fund and the Fund advisor's name(s), unless requested otherwise by the donor or fund advisor and as approved by The Endowment. The fund advisor's address may also be included on all letters unless requested otherwise. Any mail The Endowment receives for the fund will not be forwarded. Approved grants are typically sent within 30 business days of the recommendation being received or the fund advisor will be notified as to the reason for a delay. Grants made from funds at The Endowment are issued on checks with the name and logo of The Endowment. The Endowment shall assume responsibility for check writing, bookkeeping, investment management, tax reporting, auditing and evaluation of projects, and for making available to the fund advisors and fund representatives reports of fund income, expenses and grantmaking, as appropriate. Please contact The Endowment if you have questions about the exclusion of benefits from grant recommendations and/or multiple-year payments.

Successor Advisors

The donor may designate any person within one generation to be a successor advisor to exercise the privileges and duties of a fund advisor. Successor advisors may assume the privilege to advise the fund only after the deaths or resignations of all initial fund advisors named on the fund. The successor advisor(s) may be required to provide written notification and sufficient proof of the donor's or fund advisor's death prior to assuming the privileges and duties of a fund advisor. All requests to modify or appoint additional advisors and successor advisors to a fund must be communicated to The Endowment in writing. In addition, a written acknowledgement must be received from The Endowment confirming that the request has been granted. If The Endowment has not received the name(s) of an additional advisor(s) or successor advisor(s) to the fund, or other special instructions, in writing, The Endowment will use the fund's balance to support The Endowment's Unrestricted Fund.

Fund Inactivity

The Endowment may contact a fund advisor if the fund has had no activity for the prior 24 months. Failure of the advisor to respond will result in The Endowment declaring the fund inactive and transferring any remaining balance to the Unrestricted Fund, The Endowment's Unrestricted Fund.



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