



## Guiding Document for Donor Advised Funds

*Your responses to the questions below will help the Jewish Foundation understand your wishes for the use of assets remaining in (or added to) your donor advised fund at your death. It will also serve as a "road map" for your Successor Advisors and will help them carry on the charitable traditions that you established during your lifetime.*

**Fund Name:**

**Fund Advisor(s):**

**Successor Advisor(s):**

1. I plan to designate money from my estate to my Fund. \_\_\_\_\_Yes      \_\_\_\_\_No
2. I recommend to the board of directors of the Jewish Foundation of Memphis that, should a balance remain in the above name fund at the death of the Fund Advisor, outright gifts be made to the following charitable organizations (if there are no outright gifts, go to question 3):

Name of Organization	Dollar Value of Gift:	OR % of Fund Balance:	Instructions regarding use of gift:

**(Attach additional pages if necessary)**

I give the Jewish Foundation of Memphis permission to share my legacy plans with the intended beneficiaries as listed above:  
\_\_\_\_\_ yes      \_\_\_\_\_ no

***If, after outright gifts are made to the above named organizations, there is money remaining in the above named fund, please complete all sections of question 3. If not, please proceed to signature section.***

3. I recommend to the board of directors of the Jewish Foundation of Memphis that the balance in my DAF (after outright contributions have been made, if applicable) shall adhere to the following guidelines:
  - Convert to a permanent endowment fund of the Jewish Foundation of Memphis. (Complete "Guidelines for Designated Endowment Fund" on reverse side)
  - All recommendations regarding the use of the above named Donor Advised Fund shall be determined by the Successor Advisors named in the Philanthropic Fund Gift Form.
  - Adhere to specific guidelines (Complete "Spending Guidelines" on reverse side).

**Signatures:**

Signed \_\_\_\_\_ Date \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_

### Guidelines for Designated Endowment Fund

Name of Designated Endowment Fund \_\_\_\_\_

Purpose of Designated Endowment Fund \_\_\_\_\_

**Grants**

**Frequency:**

\_\_\_\_ Annually      \_\_\_\_ Semi-annually      \_\_\_\_ Quarterly      \_\_\_\_ Other \_\_\_\_\_

**Amount Available for Grants:**

\$ \_\_\_\_\_ or \_\_\_\_\_ % of the fund balance as of \_\_\_\_\_ (date)

Would there ever be a time when principal of the Designated Endowment Fund could be invaded? (such as an emergency in the Jewish community)? Please describe:

**Grantee Organizations**

**Do you have a preference for the types of organization that may receive grants from this fund?** \_\_\_\_ Yes      \_\_\_\_ No

If yes, please describe your preferences (use this space to list specific organizations by name if that is your preference):

### Spending Guidelines

Name of Donor Advised Fund \_\_\_\_\_

Name(s) of Successor Advisor(s) \_\_\_\_\_

**Grants**

**Frequency:**

\_\_\_\_ Annually      \_\_\_\_ Semi-annually      \_\_\_\_ Quarterly      \_\_\_\_ As determined by Successor Advisors

**Amount Available for Grants:**

\$ \_\_\_\_\_ or \_\_\_\_\_ % of the fund balance as of \_\_\_\_\_ (date)

OR

\_\_\_\_ As determined by Successor Advisors

**Grantee Organizations**

**Do you have a preference for the types of organization that may receive grants from this fund?** \_\_\_\_ Yes      \_\_\_\_ No

If yes, please describe your preferences (use this space to list specific organizations by name if that is your preference):

Do you have a time horizon in mind for the above named fund? (e.g. last in perpetuity, spend down in 5 years, as determined by Successor Advisors, etc.)