

# American Endowment Foundation's Donor Advised Fund Application

Refer to the previous pages of this Donor Advised Fund Program Description or contact American Endowment Foundation if you have any questions about this application.

**Donor Information** (This is the person who advises AEF concerning grants, investments, and Fund disposition issues. If you would prefer to establish an Advisory Committee of the Fund, please attach a separate list of their names and addresses, and be sure to identify the spokesperson.)

| <b>Donor/Advisor #1</b>                                  | <b>Donor/Advisor #2</b>                                  |
|--|--|
| Name   | Name   |
| Date of Birth  | Date of Birth  |
| Mailing Address  | Mailing Address  |
| City                      State                      Zip | City                      State                      Zip |
| Business Phone   | Business Phone   |
| Home Phone   | Home Phone   |
| Email  | Email  |

**How Would You Like to be Addressed?** (e.g. Mr. and Mrs. John A. Smith; Joan and John Smith, etc. This is the name we will provide to charities that receive grants from your Donor Advised Fund, unless you request anonymity.)

**Name of Donor Advised Fund** (e.g. Smith Family Charitable Fund. This name will appear on each grant letter and check, unless you request it be withheld.)

**Statement of Purpose of the Fund** (e.g. "The Smith Family Fund supports charities in the following areas: education, arts and public causes in need.")

**Initial Contribution** (Please describe the assets comprising the initial contribution to establish the Fund, including approximate value.)

**Anticipated Future Contributions** (e.g. IRA beneficiary, life insurance proceeds, CRT remainder interest, etc.)

**Successor Advisor Election** (You may name one or several individuals to succeed you as Successor Advisor of this Fund. Attach additional sheets if necessary. If more than one individual is listed, please indicate the spokesperson, and whether any individual should be treated as a Contingent Successor Advisor. If you do not wish to name a Successor Advisor, skip to Other Fund Disposition Options.)

| <b>Successor Advisor #1</b>                              | <b>Successor Advisor #2</b>                              |
|--|--|
| Name   | Name   |
| Relation to Donor/Advisor(s)                             | Relation to Donor/Advisor(s)                             |
| Date of Birth  | Date of Birth  |
| Mailing Address  | Mailing Address  |
| City                      State                      Zip | City                      State                      Zip |
| Business Phone   | Business Phone   |
| Home Phone   | Home Phone   |
| Email  | Email  |

## Other Fund Disposition Options

The following options are alternatives to the Donor/Advisor naming a Successor Advisor of the Fund. Upon notification of the death of the initial Donor/Advisor(s), American Endowment Foundation will enact the selected disposition plan. Please discuss complicated disposition plans with AEF to avoid confusion or potential problems.

If you have not named a Successor Advisor, select one of the following plans.

I (we) recommend the Fund to continue on, making grants annually to the following charitable organizations:

| Name of Organization | City, State | Percentage of Fund Balance |
|----------------------|-------------|----------------------------|
|----------------------|-------------|----------------------------|

I (we) recommend the Fund to terminate, and the proceeds be granted to the following charitable organizations:

| Name of Organization | City, State | Percentage of Fund Balance |
|----------------------|-------------|----------------------------|
|----------------------|-------------|----------------------------|

I (we) recommend the Fund to continue, with AEF's Board of Directors, using its discretion, awarding grants to worthy charitable organizations in the following field of interest and/or community (please describe):

I (we) recommend the following customized disposition plan for this Fund:

**Investments** (You may recommend a financial professional to work with American Endowment Foundation concerning the investments of this Fund. This person will not have advisory privileges of a Donor/Advisor.)

Name of Financial Professional

Company

Mailing Address

City

State

Zip

Phone

Fax

Email

**Signature (check one box):**

I hereby irrevocably give the property described in this application and its attachments to American Endowment Foundation, to establish a Donor Advised Fund (i.e. for current gifts).

I intend, through a future transfer of property to American Endowment Foundation, to establish a Donor Advised Fund. This expression is not to be considered a pledge (i.e. primarily for testamentary gifts).

I intend to recommend a distribution of assets from another charitable organization to American Endowment Foundation, to establish a Donor Advised Fund (i.e. for transfers from other Donor Advised Fund programs).

I intend that the person described above as Donor/Advisor will periodically recommend grants from this Fund for charitable purposes. I understand that AEF's Board of Directors, in its sole discretion, is free to accept or reject any recommendations. I also understand that AEF's Board of Directors is empowered to modify any restriction related to this Fund, if in its judgment such restriction becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with charitable needs.

I have read the Donor Advised Fund Program Description, and agree to its terms and conditions. I understand that AEF's Board of Directors reserves the right to modify the Donor Advised Fund Program, as it deems necessary.

I hereby certify that to the best of my knowledge all information presented in connection with this application is accurate, and I will notify AEF promptly of any changes.

---

Donor's Signature

Date

---

Donor's Signature

Date

**American Endowment Foundation**

1521 Georgetown Road • P.O. Box 911 • Hudson, Ohio 44236-5911

Phone 888-440-4233 or 330-655-7552 • Fax 330-656-2063

Website [www.AEFonline.org](http://www.AEFonline.org) • Email [info@AEFonline.org](mailto:info@AEFonline.org)