Deferred Gift Notification to Establish a Fund

JEWISH COMMUNAL FUND
Your **personal connection** to charitable giving

A. NAME YOUR FUND

Please indicate how you would like your fund named. The fund will be established upon receipt of a contribution from your estate or other planned giving vehicle. Grants made from your fund are accompanied by a letter that includes the fund name, unless anonymity is requested.

Name of fund to be established upon receipt of gift

May we list your fund name in our Annual Report?: ☐ Yes ☐ No

B. RECOMMENDERS

Please indicate whom you would like to authorize as the Recommender(s) on the fund. Recommenders may recommend grant distributions and investment allocations and designate successor recommenders, unless you indicate otherwise.

☐ **Each recommender may act independently** **OR** ☐ **Recommenders must act jointly**

Name

*Date of birth – required for security purposes

Business name

Business address

City State Zip

Business phone

Business fax

Home address

City State Zip

Home phone

Home fax

Email

Name

*Date of birth – required for security purposes

Business name

Business address

City State Zip

Business phone

Business fax

Home address

City State Zip

Home phone

Home fax

Email

C. SUCCESSOR CHARITY

Rather than designate a recommender, you may recommend that the assets in your fund be distributed to one or more IRS-qualified public charities. Kindly provide us with your list of charities indicating the percentage of fund assets you would like distributed to each. *Please attach additional sheets if necessary.*

Please note: By law, JCF is unable to make grants to certain types of charities. Please refer to the *Policies and Procedures* booklet for grantmaking guidelines.

Name of organization

Federal tax id number (if known)

Address

City State Zip

Percent of fund assets

Name of organization

Federal tax id number (if known)

Address

City State Zip

Percent of fund assets

D. SIGNATURES

Signature Date

Acknowledged for Jewish Communal Fund by Date

How did you hear about the Jewish Communal Fund?

☐ Radio ☐ Event ☐ Mailing Referred by: _____