

B. NAME YOUR FUND

You have the privilege of naming your fund. Grants made from your fund are accompanied by a letter which includes the fund name, as well as the name and address of the person recommending the grant, unless anonymity is requested.

A fund number will be assigned to you once your initial contribution and donor application are received.

Name of your fund

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

C. ADDITIONAL FUND PARTICIPANTS DURING YOUR LIFETIME: RECOMMENDERS

If you would like to authorize additional family members or other individuals to obtain fund information and recommend grants, please provide us with their contact information. *(You may attach additional sheets if necessary.)*

We will mail them a *Policies and Procedures* booklet and a *Recommender Agreement*, which must be returned to us before they may begin using the fund. You may add or remove recommenders from your fund at any time.

Upon the death of all donors, recommenders assume all the privileges of recommendation that were conferred on the donors (see section A).

Name

Name

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Relationship to donor

Relationship to donor

Company

Company

Address

Address

City State Zip

City State Zip

Daytime phone

Daytime phone

Email

Email

Each recommender may act independently OR Each recommender must act jointly with a donor

D. SUCCESSION PLAN

All succession plans must be submitted in writing and approved by the Jewish Communal Fund during your lifetime. You may change your successor designations at any time. You may not designate successors through your will.

Successor Recommenders. Successor recommenders assume all the privileges of recommendation following the death of the last surviving donor or recommender. **A successor recommender may designate his or her own successor recommenders, unless the donor has indicated otherwise.** *(You may attach additional sheets if necessary.)*

Name

Name

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Relationship to donor

Relationship to donor

Address

Address

City State Zip

City State Zip

Each successor may act independently OR All successors must act jointly OR
 Divide remaining assets evenly to establish separate funds for each successor

F. INITIAL CONTRIBUTION \$5,000 is required to begin using the fund.

CASH

- Send check Make payable to Jewish Communal Fund \$ _____
- Wire cash Please call JCF before wiring \$ _____
- Credit Card Please call JCF regarding credit card fees \$ _____

MARKETABLE SECURITIES

If you are transferring securities via DTC, please send one copy of the *Securities Transfer Instructions* form to your broker and a copy to the Jewish Communal Fund.

If you are delivering stock certificates, please deliver a stock power under separate cover with a signature guarantee. A signature guarantee may be obtained from a bank or broker.

Broker name:	Firm name:	Telephone:
Name of security:	Number of shares or units:	Approximate dollar amount:

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MUTUAL FUND SHARES Please call JCF for transfer instructions.

G. ACKNOWLEDGMENTS

- ✓ I acknowledge that I have read the *Policies and Procedures* booklet and agree to its terms and/or conditions. I certify that all information in this application is accurate and complete and I will notify the Jewish Communal Fund of any changes.
- ✓ I acknowledge that if the donors have elected to act independently, each donor has the right to name the fund, recommend grant distributions, recommend investment alternatives, and designate recommenders and successors unless and until both donors notify the Jewish Communal Fund to the contrary. There may be circumstances in which the Jewish Communal Fund may, in its discretion, forego taking any further action with respect to the fund and require the donors to provide joint instructions going forward.
- ✓ I understand that if no successor recommender or successor charity designation is on file at the Jewish Communal Fund, at the time of my death or the death of the last recommender, the income and principal remaining in the fund will be transferred to the JCF Special Gifts Fund. The Board of Trustees of the Jewish Communal Fund assumes responsibility for distributing income and principal from said Fund.

H. SIGNATURES

All donors named on page 1 must sign below to establish a fund.

Donor 1 signature	Date
Donor 2 signature	Date
Acknowledged for Jewish Communal Fund by	Date

How did you hear about the Jewish Communal Fund?

- Advisor JCF donor Radio Event Mailing Press

Referred by: _____