

Appointment of Recommenders and Successor Recommenders

NOTE: The information on this form supersedes all previous designations.
If you have any questions, please call the Jewish Communal Fund at (212) 752-8277.

A. DONOR INFORMATION

Donor name

Name of fund Fund #

B. RECOMMENDERS

If you would like to authorize additional family members or other individuals to recommend grants and obtain confidential information about your fund, please complete this section. We will mail them a *Policies and Procedures* booklet and *Recommender Agreement* form. These must be returned to us before they may recommend grants from your fund.

Recommenders have the ability to recommend grants independently or jointly with you during your lifetime. Upon the death of all donors, recommenders assume the privileges of recommending grant distributions and asset allocations.

- Each recommender may act independently OR
- Each recommender must act jointly with a donor OR
- Both recommenders must act jointly

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 City State State Zip Zip

Phone Phone

Email Email

DEVELOPING A SUCCESSION PLAN

Your donor-advised fund may be used to establish a legacy of giving that will last for generations. If you would like assistance developing a succession plan that meets your long-term philanthropic objectives, please call us for a consultation.

E. 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 herein is accurate and complete and I will notify the Jewish Communal Fund of any changes.
- ✓ I understand that if no successor recommender or successor charity designation is on file at the Jewish Communal Fund, at the time of the death of the last fund participant, 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.

F. SIGNATURES

Donor signature Date

Donor signature (if donors are required to act jointly) Date

Acknowledged for Jewish Communal Fund by Date

Please fax or mail this completed form to the Jewish Communal Fund.