



The Jewish Community Foundation of the West

Designate Successors to Donor Advised Philanthropic Fund

Jewish Community Foundation of the West
 2130 21st Street, Sacramento, CA 95818
 Phone: 916-441-1613 Email: pam.herman@jcfwest.org

Donors have several options for designating successors or beneficiaries upon the death, incapacity or other disqualification of ALL Donors of this Fund. The options include:

1. Name up to two individuals to succeed them as Donor-Advisors for their account, Option [A] **OR**
2. Nominate up to two charitable organizations to receive any proceeds remaining in the account, Option [B] **OR**
3. Name the Jewish Community Foundation of the West (the "Foundation"), Permanent Endowment Fund as the beneficiary. Permanent Endowment distributions will be made annually as part of a grants processes administered by the Foundation Trustees. Option [C] is automatically selected.

A Name of Your Fund _____

Successor #1				Successor #2 (optional)			
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Miss <input type="checkbox"/> Dr.				<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Miss <input type="checkbox"/> Dr.			
Name (first)			(Middle)	Name (first)			(Middle)
Mailing Address:				Mailing Address:			
City, State, Zip				City, State, Zip			
Home Phone:		Business Phone:		Home Phone:		Business Phone:	
E-mail Address:				E-mail Address:			
Relationship to Donor				Relationship to Donor			

- Select One:
- Successor(s) named above succeed(s) to the account with full rights as Donor.
 - Successor #1 named above succeeds to the account with full rights as Donor. Successor #2 is a Contingent Successor and succeeds to the account only upon the death, incapacity, refusal to serve or other disqualification of Successor #1.

B Recommend Charitable Organizations as Beneficiary(ies). (Optional. Up to two.)

Beneficiary Charitable Organization #1				Beneficiary Charitable Organization #2			
Organization				Organization			
Mailing				Mailing			
City, State, Zip Code:				City, State, Zip Code:			
Telephone Phone:		Federal Tax ID Number (if known)		Telephone Phone:		Federal Tax ID Number (if known)	
Percentage of Charitable Gift Account or Dollar Amount				Percentage of Charitable Gift Account or Dollar Amount			

C Name the Foundation Permanent Endowment Fund as Beneficiary

- Donate remaining assets in the fund to the Jewish Community Foundation of the West Permanent Endowment Fund for disbursement in accordance with Foundation grantmaking policies. Donation will occur upon the death, incapacity or other disqualification of all Donors.

Donor # 1 Signature	Date
Donor # 2 Signature	Date