

Appointment of Successors

Updated May 2023



Upon the death of all Fundholders, Successors assume all privileges conferred upon the Fundholder(s), including recommending grant distributions and asset allocations, adding and removing people from the fund, and designating Successors.

NOTE: The information on this form supersedes all previous designations.

FUNDHOLDER INFORMATION

Fundholder name

Name of fund

Fund #

Fundholder address

Email

Cell phone

Home phone

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 at (212) 752-8277.

You can leave your fund to individual(s), charitable organization(s), or a combination of the two. Please choose from the following:

I would like individual(s) to succeed me on my fund (please fill out part A).

I would like charitable organization(s) to succeed me on my fund (please skip to part B).

I would like to divide remaining fund assets between individual(s) and charities (please skip to part C).

A. DESIGNATING INDIVIDUAL SUCCESSOR(S)

Please select one of the following options to indicate how your successors will share the responsibilities of the fund:

Each Successor may act independently OR

Divide remaining assets evenly to establish separate funds for each successor

Name

Name

*Date of birth – required for security purposes

*Date of birth – required for security purposes

Relationship to Fundholder

Relationship to Fundholder

Address

Address

City

State

Zip

City

State

Zip

Phone

Home

Business

Cell

Phone

Home

Business

Cell

Email

Email

B. DESIGNATING A CHARITY

If you do not wish to name a successor, you may recommend that the remaining assets in the fund be distributed upon your death to one or more qualified public charities. The charities are subject to review and approval by the Jewish Communal Fund. If the organization is no longer a public charity or is not otherwise approved by JCF, we will transfer the income and principal remaining in the fund to the JCF Special Gifts Fund. *(Please attach additional sheets if necessary.)*

Name of organization

Address

City State Zip

Phone

Percent of fund assets

Name of organization

Address

City State Zip

Phone

Percent of fund assets

C. DESIGNATING INDIVIDUALS AND CHARITIES

If you would like to divide your fund's assets between individual(s) and one or more qualified public charities, please fill out the section below. *(Please attach additional sheets if necessary.)*

Name of individual Successor

*Date of birth – required for security purposes

Relationship to Fundholder

Address

City State Zip

Phone Email

Percent of fund assets

Name of organization

Address

City State Zip

Phone

Website

Contact person (if any)

Percent of fund assets

ADDITIONAL INSTRUCTIONS

D. ACKNOWLEDGMENTS

I understand that if no Successor or successor charity designation is on file at the Jewish Communal Fund at the time of the death of the last Fundholder, 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.

JCF will endeavor to honor the wishes of our Fundholders, and communicate these wishes to their desired Successors. Ultimately, however, Successors will assume the full rights and privileges granted to Fundholders, including the ability to add or remove people on the fund, update the investment allocation, and create a new succession plan for the fund.

E. SIGNATURES

Fundholder 1 Signature	Date
Fundholder 2 Signature	Date
Acknowledged for Jewish Communal Fund by	Date

Please email this completed form to the Jewish Communal Fund at rep@jcfny.org.