



# Appointment of Successors

Updated June 2018

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

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

\_\_\_\_\_  
Email



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## 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

\_\_\_\_\_  
Name of organization

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Percent of fund assets

\_\_\_\_\_  
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

\_\_\_\_\_  
Name of organization

\_\_\_\_\_  
\*Date of birth – required for security purposes

\_\_\_\_\_  
Address

\_\_\_\_\_  
Relationship to Fundholder

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Website

\_\_\_\_\_  
Phone Email

\_\_\_\_\_  
Contact person (if any)

\_\_\_\_\_  
Percentage of fund assets

\_\_\_\_\_  
Percentage of fund assets



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## ADDITIONAL INSTRUCTIONS

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## 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.

## SIGNATURES

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Fundholder 1 signature Date

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Fundholder 2 signature Date

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Acknowledged for Jewish Communal Fund by Date

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