The Jewish Community Foundation of the West

Designate Successors to Donor Advised Philanthropic Fund

Jewish Community Foundation of the West
PO Box 660663, Sacramento, CA 95866
Phone: 916-484-0954 Email: JCFoundationWest@aol.com

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

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Dr.

Name *(first)*	*(Middle)*	*(Last)*
Mailing Address:		
City, State, Zip		
Home Phone:	Business Phone:	
E-mail Address:		
Relationship to Donor		

Successor #2 (optional)

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss ☐ Dr.

Name *(first)*	*(Middle)*	*(Last)*
Mailing Address:		
City, State, Zip		
Home Phone:	Business Phone:	
E-mail Address:		
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

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

Beneficiary Charitable Organization #2

Organization	
Mailing	
City, State, Zip Code:	
Telephone Phone:	Federal Tax ID Number *(if known)*
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