



Appointment of Fund Advisors

At any time, the creator of a donor-advised fund (the “Founder”) may appoint other people, such as relatives, friends, or trusted business associates, as advisors to suggest grants from the fund. Advisors, however, may not appoint other advisors. The Founder may also revoke an advisor’s privilege, designate a different advisor or choose not to name any advisor.

Advisors have the same privilege of making grant recommendations as the Founder until the privilege is revoked by the Founder. An advisor may request grants, from income or principal (to the extent the fund agreement permits), without the consent of other advisors or the further consent of the Founder. It is the responsibility of the advisors to communicate with one another. Unless otherwise requested by the Founder, all advisors receive quarterly statements and other standard mailings from The Trust.

The Founder may specify that an advisor is to serve only upon the death or incapacity of the Founder. This type of advisor is called a “successor advisor”. Like a current advisor, a successor advisor may not appoint other advisors or successor advisors.

A Founder of a fund who wishes to appoint advisors should complete and sign the section below. Once you’ve completed the form please return it to us attn. Maggie Murphy. You may attach additional sheets as necessary.

APPOINTMENT FORM

NAME OF FUND _____

NAME OF PERSON COMPLETING FORM _____

Advisor 1

Name: _____

Mailing Address: _____

Phone: _____ E-Mail _____

Relationship to Founder: _____

This Advisor will serve as a: ☐ *Current Advisor* ☐ *Successor Advisor*

Advisor 2

Name: _____

Mailing Address: _____

Phone: _____ E-Mail _____

Relationship to Founder: _____

This Advisor will serve as a: ☐ *Current Advisor* ☐ *Successor Advisor*

Remove: _____

Founder’s Signature: _____ Date _____