



JEWISH COMMUNITY
FOUNDATION
OF GREATER KANSAS CITY

Create a New **Donor Advised Fund**

Thank you for your interest in a Donor Advised Fund through the Jewish Community Foundation of Greater Kansas City. The following information will be used to draft a fund agreement for your fund, and we will contact you within one week. If you have any questions please contact Josh Stein at 913-327-8121.

Name: _____

Spouse Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Work Cell Home

Email Address(es): _____

Preferred Fund Name: _____

This is the name that appears on grant checks issued from the Foundation. For example, the Jonathan and Sarah Schwartz Donor Advised Fund or the Schwartz Family Charitable Fund.

The submitted information is not legally binding and will not become binding until we receive and accept your signed fund agreement.

Smarter Giving. Your Way.



Successor Advisor(s)

Upon Death or Incapacity
of the Advisors

The privilege of making recommendations with respect to distributions from the Fund belongs to the Donors during their lifetimes (the “Advisors”). Upon the death or legal incapacity of the Advisors, the privilege of making recommendations with respect to distributions from this Fund shall belong to the Successor Advisors (named below) during his/her/their lifetime(s) (the “Successor Advisor(s)”).

1
Name: _____
Address: _____ City/State: _____ Zip: _____
Phone: _____ Email: _____ Date of Birth: ____/____/____

2
Name: _____
Address: _____ City/State: _____ Zip: _____
Phone: _____ Email: _____ Date of Birth: ____/____/____

3
Name: _____
Address: _____ City/State: _____ Zip: _____
Phone: _____ Email: _____ Date of Birth: ____/____/____

4
Name: _____
Address: _____ City/State: _____ Zip: _____
Phone: _____ Email: _____ Date of Birth: ____/____/____

After the death, legal incapacity or resignation of the Successor Advisor(s), or after the death, legal incapacity or resignation of the Advisors if no Successor Advisor(s) has/have been named, the Fund shall be closed and the balance transferred to the Community Legacy Fund of the Jewish Community Foundation of Greater Kansas City (the “Foundation”). The privilege of making recommendations with respect to distributions from the Community Legacy Fund belongs to the Grants Committee of the Foundation.