



# TOP Jewish Foundation

*We make giving easier.*

## New Donor Advised Fund Worksheet

Fund Name: \_\_\_\_\_

Donor Name(s): \_\_\_\_\_

Address for Statements: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

1. Names of Recommenders: \_\_\_\_\_

2. Names of Successor Recommenders if any: \_\_\_\_\_

- a.  Upon death of either donor  
 Upon death of both donors
- b.  Can recommend additional recommenders  
 Cannot recommend additional recommenders

3. Send additional statements to: \_\_\_\_\_

About the Initial Gift

1. How much? \_\_\_\_\_
  2. In what form? \_\_\_\_\_
  3. Anticipated date of the gift? \_\_\_\_\_
  4. Details about non-cash gifts: \_\_\_\_\_
- 

Investment Option/s (see Fund Allocation Form)

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Balanced Pool (55% equities, 45% fixed income) |
| <input type="checkbox"/> | Equities Pool                                  |
| <input type="checkbox"/> | Fixed Income Pool                              |
| <input type="checkbox"/> | Money Market                                   |

Recognition and Personal Information

I permit TOP to use the name of this fund in publicity. I understand fund balances will never be published.

I permit TOP to publish the names of organizations that my fund may distribute to. I understand that grant amounts will never be published.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Ellen Weiss, Executive Director

\_\_\_\_\_  
Date