



Donor-Advised Fund Request of Change Form

Request to Add Additional Donor(s), Change Successor(s) or Change the Fund Name

Please complete this form to request changes to your donor-advised fund.

Current Fund Name		Fund Number	
Donor Requesting Change	Title & Full Legal Name		
Daytime Phone		Email	
<input type="checkbox"/> Change or Add Fund Donors – check all that apply		<input type="checkbox"/> Update Current Information	<input type="checkbox"/> Add New Fund Donor*
* Please remember all fund donors have full and equal privileges to recommend grants, recommend investment portfolios, alter succession plans and name additional fund donors.			
Updated or New Donor	Title & Full Legal Name		
Social Security Number		Email	
Home Phone		Other Phone	
Legal Address			
City		State	Zip Code
Mailing Address			
City		State	Zip Code
<input type="checkbox"/> Change Successor(s) and/or Beneficiary(ies)			
Fund donors may name individuals and/or charitable organizations and/or charitable initiatives of The Advise Us Fund® to serve as successor-advisors/ beneficiaries to receive all or part of the fund balance. Successor allocations (% of Fund) must total 100 percent. Any fund without a named successor-advisor or beneficiary will be redeemed by the Board of Directors of The Advise Us Fund for its charitable initiatives.			
Add or Remove or Change an Individual Successor-Advisor # 1			
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Title & Full Legal Name
Social Security Number		Email	% of Fund
Date of Birth	Relationship to Primary Account Holder		
Legal Address			
City		State	Zip Code
Add or Remove or Change an Individual Successor-Advisor # 2 (attach additional sheets with required information as necessary)			
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Title & Full Legal Name
Social Security Number		Email	% of Fund
Date of Birth	Relationship to Primary Account Holder		
Legal Address			
City		State	Zip Code
Add or Remove or Change a Charitable Organization* # 1			
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Organization Name
Federal Taxpayer ID		Phone	% of Fund
Legal Address			
City		State	Zip Code
* All charitable beneficiary recommendations are reviewed to ensure they meet federal charitable standards at the time of distribution.			

Add or Remove or Change a Charitable Organization* # 2 (attach additional sheets with required information as necessary)					
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Organization Name		
Federal Taxpayer ID		Phone		% of Fund	
Legal Address					
City			State	Zip Code	
* All charitable beneficiary recommendations are reviewed to ensure they meet federal charitable standards at the time of distribution.					
Add or Remove or Change the Percentage of one or more Charitable Initiatives from The Advise Us Fund					
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Programming support for grass roots charities	% of Fund	
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	Consultative support for grass roots charities	% of Fund	
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	The Advise Us Fund's Continuity Fund*	% of Fund	
<input type="checkbox"/> Add	<input type="checkbox"/> Remove	<input type="checkbox"/> Change Percentage	The Advise Us Fund's Founders Fund**	% of Fund	
* Annual grants made by the Board of Directors.					
** Annual grants made by the Board of Directors specifically supporting philanthropic innovation and research.					
<input type="checkbox"/> Change Fund Name*					
* Unless you request anonymity when you recommend grants, the fund name will appear on all correspondence to organizations that receive grants from your donor-advised fund. Please remember that for legal reasons the words "trust," "endowment," and "foundation" may not appear in the name of the donor-advised fund.					
New Fund Name					
Signature Section for Donor Requesting Change(s) (mandatory) and New or Updated Donor (if applicable)					
I hereby certify that to the best of my knowledge, all the information provided in this Request of Change form is accurate, and I will notify The Advise Us Fund in writing of any errors or changes. Further, I confirm that I have read the current policy and guidelines and agree to all terms outlined and conditions therein. I certify that I have full authority to request this change. PLEASE NOTE: ALL CHANGES WILL BE VERIFIED FOR ACCURACY AND SECURITY PURPOSES – YOU MAY RECEIVE MULTIPLE COMMUNICATIONS TO VERIFY THIS INFORMATION.					
Donor Requesting Change(s)	Title & Full Legal Name				
Signature				Date	
New or Updated Donor	Title & Full Legal Name				
Signature				Date	

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