

Request to Add Additional Donor or Change Successor Form

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

Fund Name	Number			
Donor requesting change (information provided will not be used to update your donor account)				
First Name				
Change or Add Fund Donor(s				
	☐ Add Name as additional fund donor			
□ Update current information				
□ Update current information	 Add Name as additional fund donor full and equal privileges to recommend grants, recommend inve 			
□ <i>Update current information</i> Please remember all fund donors have portfolios and alter succession plans an	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inve d name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inved a name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title First Name	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inve d name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title First Name Middle Name	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inved a name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title First Name Middle Name Last Name	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inved a name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title First Name Middle Name Last Name Social Security Number	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inved name additional fund donors.			
□ Update current information Please remember all fund donors have portfolios and alter succession plans an Title First Name Middle Name Last Name Social Security Number Legal Address	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inved a name additional fund donors.			
Please remember all fund donors have portfolios and alter succession plans and Title	□ Add Name as additional fund donor full and equal privileges to recommend grants, recommend inve d name additional fund donors.			

	Alternate Telephone				
	Email Address				
4.	Change Fund Name Unless you request anonymic correspondence to organizate	•		• •	
	New Fund Name				
	Please remember that for leg		ds "trust," "endowi	ment," and "foundation" may not	
5.	Change Successor(s) and/or Beneficiary(ies) Fund donors may name individual and/or charitable organizations to serve as successor-advisors to receive all or part of the fund balance. Total successor allocations must total 100 percent and any fund without a named successor or charitable beneficiary will be redeemed by the Board of Directors of The Advise Us Fund for one of its charitable initiatives.				
	Name an Individual succ	essor-advisor (atta Add	ch additional shee	ts if more than one)	
	First Name			Percent of Fund	
	Middle Name			%	
	Last Name				
	Social Security Number_				
	Date of Birth				
	Email Address				
	Relationship to Primary A				
	Legal Address				
	City	State_	Zip		
	Name a Charitable Orga	nization (attach ad	ditional sheets if m	ore than one)	
	□ Remove	□ Add			
	Organization Name				
	Federal Taxpayer ID			%	
	Phone				
	Legal Address City	State	Zip		
	/				

standard	ds at the time of distri	oution.	
Transf	er assets to an Ad	vise Us Fund Charitable Initiativ	e (please select one)
	□ Remove	□ Add	
0	Programming su	pport for grass root charities	Percent of Fund
0	Consultative sup	port for grass root charities	%
0	The Advise Us Fu	ınd's continuity fund (annual gra	nts of the board of directors)
0	Founders Fund wresearch	hich makes annual grants to sup	pport philanthropic innovation and

*All recommendations of charitable beneficiaries are subject to review to ensure they meet Federal charitable

6. Signatures

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. IT IS DONE FOR YOUR SECURITY.

Signatures Required:						
Fund Donor requesting change Signature	 Date					
New Fund Donor Signature (person indicated in item 3)						

The Advise Us Fund has applied for 501(c)(3) public charity (and the status is currently PENDING). All information provided is general and educational in nature. It is not intended nor should be construed as legal and/or tax advice. The Advise Us Fund does not provide legal or tax advice. Consult an attorney or tax advisor regarding your specific legal or tax needs.