



We are so grateful you chose DJCF to assist with your charitable giving journey. Please complete this preliminary form used to draft the initial documents of your Donor Advised Fund.

New Donor Advised Fund

Individual/Family Application

Please print or type.
* Indicates required information.

The name of my (our) fund will be the _____ Fund of the Dallas Jewish Community Foundation.

Donor Information

Donor 1

*Name: Preferred Name:

*Email Address: *Date of Birth:

*Home Address:

*Daytime Phone: cell home work

Donor 2

Name: Preferred Name:

Email Address: Date of Birth:

Daytime Phone: cell home work

Relationship of Donors to each other:

Initial Gift

* Initial Gift Amount:

* Type of Asset: Stock Check

Transfer from existing DAF:

Other Assets (please specify):

Additional Fund Advisors

Please designate any other people who will be Advisors to the Fund, in addition to the Donor(s). These individuals, along with the Donor(s) listed above, will make up the Advisory Committee. Any member of the Advisory Committee may make grant recommendations from the Fund.

Advisor 1

Name: _____ **Preferred Name:** _____
Email Address: _____ **Date of Birth:** _____
Daytime Phone: _____ **cell** **home** **work**

Relationship to Donor(s): _____

Advisor 2

Name: _____ **Preferred Name:** _____
Email Address: _____ **Date of Birth:** _____
Daytime Phone: _____ **cell** **home** **work**

Relationship to Donor(s): _____

Advisor 3

Name: _____ **Preferred Name:** _____
Email Address: _____ **Date of Birth:** _____
Daytime Phone: _____ **cell** **home** **work**

Relationship to Donor(s): _____

Advisor 4

Name: _____ **Preferred Name:** _____
Email Address: _____ **Date of Birth:** _____
Daytime Phone: _____ **cell** **home** **work**

Relationship to Donor(s): _____

Successor Advisors | Final Distribution of Funds

Succession Plan

You may choose to let your Fund continue once no members of the original Advisory Committee are able to serve by designating Successor Advisors. If you choose to designate one or more Successor Advisors, these individuals should be different than the people you listed as Advisors.

Alternately, you may designate one or more nonprofit organizations to benefit either from a one-time gift or from an endowment.

* Select one of the following.

I/We would like to name individual(s) to succeed me as advisor(s) on my fund.

Name: Phone: Email:

Name: Phone: Email:

Name: Phone: Email:

I/We would like to name charitable organization(s) to benefit from a one-time gift.

Organization 1: City: State:
EIN (if known): Percentage of assets _____%

Organization 2: City: State:
EIN (if known): Percentage of assets _____%

Organization 3: City: State:
EIN (if known): Percentage of assets _____%

I/We would like to name charitable organization(s) to benefit from an endowment.

Endowments support designated nonprofit organizations in perpetuity. This option will involve opening an endowment fund.

If no option is selected, the balance of the Fund will be donated to the DJCF Endowment Fund.

Publication Permission

* Select one of the following.

- I/We grant the Foundation permission to publish the name of the Fund for purposes of publicizing the Foundation's activities and programs.
- I/We do NOT grant the Foundation permission to publish the name of the Fund.

Jewish Future Promise

The Jewish Future Promise is a moral commitment to share Jewish stories, values, and traditions with family and friends. And, that if any charitable contributions are made upon passing, whether that be \$10 or \$10 million, at least 50% will be allocated to Jewish causes and/or the State of Israel. It is not a legal or binding agreement, but a promise to the next generation of the Jewish people.

- I/We agree to sign the Jewish Future Promise.
- I/We do NOT agree to sign the Jewish Future Promise.

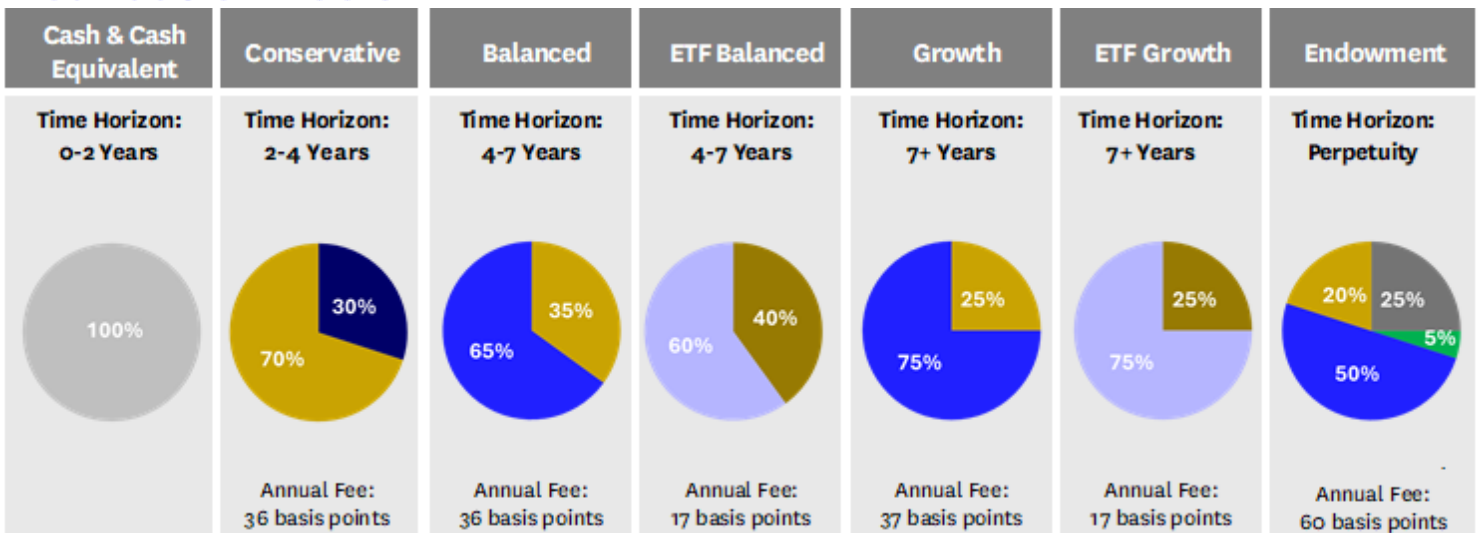
The Foundation's assets are managed by Graystone Consulting, the institutional division of Morgan Stanley, under the guidance of the Foundation's Investment Committee.

Asset Allocation Recommendation

Fundholders can select from one of the pools as illustrated below or by a combination of funds that make up each pool.

I/We recommend that the investment of the _____ **Fund**
of the Dallas Jewish Community Foundation be placed in the following selection:

Foundation Pools



- **Equity Income** ■ **Equity** ■ **ETF Equity** ■ **Bond** ■ **ETF Bond**
- **Real Assets** ■ **Private Assets** ■ **Cash & Cash Equivalent**

I/We select _____ Pool of the Dallas Jewish Community Foundation.

OR

Foundation Sub Funds

I/We select the following allocation of funds. **The total of all selections must equal 100%.**

- | | |
|--|---|
| <input type="checkbox"/> Equity Fund _____% | <input type="checkbox"/> Bond Fund _____% |
| <input type="checkbox"/> Equity Income Fund _____% | <input type="checkbox"/> ETF Bond Fund _____% |
| <input type="checkbox"/> ETF Equity Fund _____% | <input type="checkbox"/> Cash & Cash Equivalent Fund _____% |

TOTAL _____%

Administrative Fees

Annual Fee	1.00% on the first	.75% on the next	.50% on all over
Value of Fund Assets	\$0 - \$999,999	\$1 Million - \$1,499,999	\$1.5 Million

Minimum Annual Fee for Donor Advised Funds \$240 (\$20 per month)