



JEWISH COMMUNITY FOUNDATION

OF GREATER HARTFORD

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Opening an Anniversary Donor Advised Fund

We're honored to partner with you in your philanthropy by creating a customized donor advised fund just for you. With the information below, we will create a Donor Advised Fund agreement for you to sign. Once that's signed and your gift is made, you're ready to go!

We'll send you materials about getting onto the online grantmaking platform and how to make the most use of your fund, and we'd love to meet with you and your family to talk about your philanthropic goals and how we can help.

Fund Name: _____

(The fund can be named in whatever way you would like. It can be as simple as YOUR NAME Family Fund, or something creative and meaningful to you.)

Donor Advisors

You can have multiple advisors to your fund, who are all able to recommend grants from the fund to charities based on the guidelines set forth in your fund agreement. If you would prefer to limit this list to just yourself, that is fine as well.

Donor Advisors to the Fund: _____

Contact information (if not already on file): _____

Succession

After you pass away, your fund can continue. You may specify a next generation of advisors from your family, either by name now or added later.

After my successor advisors, I would like my funds to: (choose one)

be used for the benefit of the Jewish community as it evolves over time

be used for the benefit of this specific organization: _____

Special Instructions:
