Appointment of Fund Advisors

At any time, the creator of a donor-advised fund (the “Founder”) may appoint other people, such as relatives, friends, or trusted business associates, as advisors to suggest grants from the fund. Advisors, however, may not appoint other advisors. The Founder may also revoke an advisor’s privilege, designate a different advisor or choose not to name any advisor.

Advisors have the same privilege of making grant recommendations as the Founder until the privilege is revoked by the Founder. An advisor may request grants, from income or principal (to the extent the fund agreement permits), without the consent of other advisors or the further consent of the Founder. It is the responsibility of the advisors to communicate with one another. Unless otherwise requested by the Founder, all advisors have access to online information about the fund and will receive mailings from The Trust.

The Founder may specify that an advisor is to serve only upon the death or incapacity of the Founder. This type of advisor is called a “successor advisor”. Like a current advisor, a successor advisor may not appoint other advisors or successor advisors.

A Founder of a fund who wishes to appoint advisors should complete and sign the form below. Once the form is completed, please return it to us attn. Maggie Murphy. Additional sheets may be attached as necessary.

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### Appointment Form

**NAME OF FUND:** _______________________________________________________________________________

**NAME OF FOUNDER COMPLETING FORM:** _________________________________________________________

**FOUNDER’S SIGNATURE:**   _____________________________________     Date:  ___________________________

**Add Advisor 1**

Name: __________________________________________  ________________________     ________________________________

(First)         (Middle)       (Last)

Preferred Mailing Address: __________________________________________________________________________

Phone: __________________________   E-Mail _________________________________________________________

Relationship to Founder: ____________________________________________________

*This Advisor will serve as a:*  □ Current Advisor   □ Successor Advisor

**Add Advisor 2**

Name: __________________________________________  ________________________     ________________________________

(First)         (Middle)       (Last)

Preferred Mailing Address: __________________________________________________________________________

Phone: __________________________   E-Mail _________________________________________________________

Relationship to Founder: ____________________________________________________

*This Advisor will serve as a:*  □ Current Advisor   □ Successor Advisor

**Remove Advisor:** __________________________________________  ________________________________

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