



Donor Advised Fund

- Instructions**
- 1. Complete each bold numbered section below.**
 - 2. Have each Donor sign and date the completed application.**
 - 3. Mail or bring the completed form to the Foundation office (address listed below).**

1 Select a name for your Donor Advised Fund

2 Identify the Donor (s)

Each Donor, acting individually, has the authority to make contributions, nominate grants to charities, recommend Successors or charitable beneficiaries and make other recommendations pertaining to the management of the account.

Donor #1 (Primary recipient for all account correspondence)

Donor #2 (Optional)

Mr. Mrs. Ms. Dr.

Mr. Mrs. Ms. Dr.

Name (first)	(Middle)	(Last)
Mailing Address		
City, State, Zip Code		
Home Phone:	Business Phone:	
E-mail Address		

Name (first)	(Middle)	(Last)
Mailing Address		
City, State, Zip Code		
Home Phone:	Business Phone:	
E-mail Address		

3 Agree to Terms

1. I hereby request that the Jewish Community Foundation of the West (the "Foundation") open a Donor Advised Fund.
2. I understand that the contribution(s) accepted by the Foundation, are irrevocable and are not refundable to me for any reason.
3. I agree to read and be bound by the terms of the Foundation Gift Acceptance Policy, Account Management Policy, Donor Data Privacy Policy, and other such policies that may be adopted and amended by the Foundation from time to time. If I do not understand the Policy, I will notify the Foundation.
4. If there is more than one Donor on the account, each Donor has the authority, acting individually and without notice to any other account Donor, to deal with the Foundation as fully and completely as if the Donor is the sole account Donor and may make changes to the account. Removing a Donor requires the signature of all remaining Donors.

4 Signatures Required

Donor # 1 Signature	Date	Donor # 2 Signature	Date

Jewish Community Foundation of the West
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