

GREATER WORCESTER COMMUNITY FOUNDATION

Donor Advised Fund – Instructions for Successor Advisors

FUND NAME

Up to one generation of successor advisors may be named for this Donor Advised Fund at the Greater Worcester Community Foundation. This is not a requirement; but if it is important to you to pass along the granting role that you have enjoyed to children or other loved ones, then you are welcome to name successor advisors.

Name _____

Address _____

Telephone _____ Email _____

Relationship _____

Name _____

Address _____

Telephone _____ Email _____

Relationship _____

GUIDANCE FOR SUCCESSOR ADVISORS

- a) Successor advisors are expected to carry out *my/our* philanthropic objectives. Yes No
- b) Successor advisors are free to follow their own giving patterns, which may be different from mine/ours. Yes No
- c) Other guidance

FUTURE USE, FOLLOWING ACTIVE ADVISING

The Donor requests that at the end of the Advising terms the Fund shall be used in the following manner (one or more options are allowed).

_____ % Award funds at the **discretion** of the Distribution Committee for current needs

_____ % For one or more purposes or **Fields of Interest** as follows:

_____ % **Designated** for the following nonprofit organization(s):

