

DONOR ADVISED FUND APPLICATION OR ADDITION

DONOR/ADVISOR INFORMATION

First Donor

Second Donor

Address

Address

City St Zip

City St Zip

E-mail

E-mail

Phone

Phone

FUND NAME

You may name your Donor Advised Fund account; for example, "Smith Charitable DAF"
or "Smith Family DAF, in loving memory of..."

CONTRIBUTION

Standard contributions can be made
by check or wire transfer.

CHECK WIRE TRANSFER OTHER

If "other,"
please
describe:

Amount of Gift, or
Estimated Value

*To transfer publicly traded securities, real property,
personal property, closely held stock, or other assets,
please contact the Alliance Community Foundation
Planned Giving Office.*

Date of Gift

SEND CHECKS TO:

Alliance Community Foundation
Planned Giving Office
450 Sapphire Way SW
Vero Beach, FL 32968

INVESTMENT MODEL

Please recommend how you would like the fund to be invested. You may invest in more than one investment model, and select the percentage of each model you would like your funds invested. Please note that your investment choices must total 100%.

Capital Preservation

- 25%
- 50%
- 75%
- 100%

Other

Conservative

- 25%
- 50%
- 75%
- 100%

Other

Moderate

- 25%
- 50%
- 75%
- 100%

Other

Additional Instructions

FUND SUCCESSION

Donor/Advisor(s) may elect family or non-family persons to be Successor Advisors to their funds. Successor Advisors take over upon death or incapacity of the initial Donor/Advisor(s).

- Fund assets to be retained in the fund, and each successor may act independently.
- Fund assets to be retained in the fund, and all successors must act jointly.
- Fund assets to be divided equally to establish separate funds for each successor.
- No Successor Advisor, skip to **FUND DISPOSITION OPTIONS**.

First Successor

Address

City St Zip

E-mail

Phone

Second Successor

Address

City St Zip

E-mail

Phone

FUND DISPOSITION OPTIONS

The following options are alternatives to the Donor/Advisor(s) naming a Successor Advisor of the Fund. Upon notification of the death or incapacity of the initial Donor/Advisor(s), Alliance Community Foundation will enact the selected disposition plan. Please discuss the complicated disposition plans with Alliance Community Foundation to avoid any confusion or potential problems.

I (we) recommend the Fund terminate and the proceeds be granted to the following charitable organizations:

Charity Name
Address
City St Zip
Charity EIN # % of Fund

Charity Name
Address
City St Zip
Charity EIN # % of Fund

Instructions for the Organizations

I (we) recommend the Fund continue with Alliance Community Foundation's Board of Directors, using its discretion, and awarding grants to worthy charitable organizations in the following field of interest and/or community (please describe)

Interest and/or Community

I (we) recommend the following customized disposition plan for this fund:

Custom Plan

ELIGIBLE GRANTEES

Distributions from the Fund may be made only to organizations which are then-qualified under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the "Code"), and which are (a) described in Section 509(a)(2) of the Code or (b) private operating foundations described in Section 4942(j)(3) of the Code. Notwithstanding the foregoing, in the event the Code, or other applicable law, is amended in the future to disallow or disadvantage donor-advised fund distributions to any such organizations, Alliance Community Foundation may further limit the types of organizations eligible to receive distributions from the fund.

INELIGIBLE GRANTEES

The following shall be ineligible to receive distributions from the Fund: (1) individuals, (2) non-charitable organizations, (3) private foundations described in Section 509(a) of the Code (except for private operating foundations as set forth above), (4) supporting organizations described in Section 509(a)(3) of the Code, and (5) organizations not formed under the laws of the United States or its territories. Further, distributions from the Fund will not be made to pay dues for membership of an individual in an organization, purchase admission to charitable events, or to discharge or satisfy a legally enforceable obligation or personal pledge that has been made by the Donor or any individual or entity. Distributions also will not be made to support or promote political or legislative activities.

In case of doubt regarding the eligibility of a particular institution, Alliance Community Foundation, in its sole discretion, will make the ultimate decision regarding an institution's eligibility.

SIGNATURES

I hereby irrevocably give the property described in this agreement to Alliance Community Foundation to establish a Donor-Advised Fund.

I intend that this Fund be operated exclusively for charitable purposes, and that it be treated as a component fund of Alliance Community Foundation.

I intend that the person identified as the Advisor(s) will periodically recommend grants from the Fund for charitable purposes. I understand Alliance Community Foundation's Board of Directors, in its sole discretion, is free to accept or reject any recommendations and is empowered to modify the Donor-Advised Fund Program as it deems necessary.

I hereby certify to the best of my knowledge all information presented in connection with this agreement is accurate and I will notify Alliance Community Foundation promptly of any changes.

First Donor Second Donor
Date Date

Acknowledged and Accepted by Alliance Community Foundation:

Alliance Community Foundation Printed Name
Title Date