

# SERVICES FOR FAMILIES & INDIVIDUALS

## DONOR ADVISED FUND CHANGE FORM



- Enter the name of the fund and then only the information that you wish to change.
- Please mail or fax completed form to Give2Asia, 600 California Street, 11th Floor, San Francisco, CA 94108, fax (415) 967-6290. If faxed, please also mail originals.
- Should you have questions, please contact Give2Asia at (415) 967-6300 or email [info@give2asia.org](mailto:info@give2asia.org).

### I. FUND NAME *(required for all changes)*

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Fund Name \_\_\_\_\_

### II. CHANGE NAME OF FUND

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New Fund Name \_\_\_\_\_

### III. CHANGE FUND ADVISOR INFORMATION

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There may be up to two named Advisors for each Fund, each with full and equal rights to recommend grants, recommend rebalancing of the fund's investment, and name successors. If there is more than one mailing address, all Fund correspondence will be sent to Advisor one.

- Add new Fund Advisor.
- Revise Fund Advisor contact information.
- Remove Fund Advisor *(requires signature of advisor being removed)*.

#### Advisor One

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

Preferred Document Delivery Method:  Postal Mail  Email

#### Advisor Two

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

Preferred Document Delivery Method:  Postal Mail  Email

#### IV. CHANGE FINANCIAL ADVISOR INFORMATION

If you wish to authorize your financial advisor to make recommendations on your behalf on the reallocation of investment pools for this Fund, please provide the following information.

- Add new financial advisor.
- Revise financial advisor contact information.
- Remove financial advisor.

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- My financial advisor should receive duplicate quarterly reports and account statements.

Advisor Name \_\_\_\_\_

Firm \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

\_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

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#### V. CHANGE SUCCESSOR INFORMATION

Advisors have the option, upon the death, incapacity or other disqualification of both named Advisors to the Fund of allocating a percentage of the remaining assets among the following options. If no selection is made, the remaining assets in the Fund will be transferred to the Friends of Give2Asia Fund. Select any combination of the following as beneficiaries.

- Friends of Give2Asia Fund** (*default option*) % \_\_\_\_\_

The Friends of Give2Asia Fund allows Give2Asia to carry out its work in support of local charitable groups across Asia.

- A Give2Asia Fund** % \_\_\_\_\_

Transfer remaining assets in the fund to an existing Give2Asia Fund.

Fund Name \_\_\_\_\_

- An Asia-based Charitable Organization** % \_\_\_\_\_

Advisors may recommend a qualified Asian charitable organization to receive the remaining proceeds of the Fund. All recommendations of charitable beneficiaries are subject to the approval of the Give2Asia Board, in accordance with its grantmaking policies, at the time the gift would take effect.

Organization \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

Fax \_\_\_\_\_ email \_\_\_\_\_

**Individual(s) as Successor Advisors.** % \_\_\_\_\_

Advisors may name up to two individuals as Successor Advisors to the account with full rights as Fund Advisors. Successor Advisors serve for their lifetime and may not name successors.

Advisor One

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

Advisor Two

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Day Telephone \_\_\_\_\_ Evening Telephone \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

**VI. TERMS OF THESE CHANGES TO THE DONOR ADVISED FUND AGREEMENT**

I (we) understand that these changes will be subject to all the terms that apply to the Fund, in accordance with Section VIII of my Give2Asia *Donor Advised Fund Application & Agreement*. Any new Advisor agrees to comply with the terms and conditions of the Fund. If there is more than one Advisor to the Fund, each Advisor has the authority, acting individually and without notice to any other Fund Advisor, to deal with Give2Asia as fully and completely as if the Advisor is the sole Fund Advisor and may make any changes to the Fund permitted by the policies of Give2Asia as may be in effect at the time, with the exception of removing other Fund Advisors.

*Signature of Advisor* \_\_\_\_\_ *Date* \_\_\_\_\_

*Signature of Second Advisor\** \_\_\_\_\_ *Date* \_\_\_\_\_

\*Required if adding or removing an Advisor