

ADVISED FUND AGREEMENT



- Establish a New Fund
- Update Fund Information

Name of Fund

e.g., Smith Family Fund or Eucalyptus Fund

Contact Information

Role: Check all that apply. *(See Terms and Conditions document for definitions.)*

- Fund Advisor
- Establishing Donor
- Primary Contact *(Please select only one primary contact on this form.)*

Name Male Female

Mailing Address Home Business

City State Zip

Home Phone Mobile Phone

Business Phone Fax

Email #1 Email #2

Company Name

Title

Date of Birth

DonorConnect - Online Services
Would you like online access to your fund? Yes No
(Online access varies by the role of each contact.)

Type of Fund

Please indicate a fund type below:

- Donor Advised Committee Advised
- Memorial Named Endowed Fund
- Field of Interest Designated
- Scholarship:
 Donor Involved *or* Foundation Managed

Contact Information

Role: Check all that apply. *(See Terms and Conditions document for definitions.)*

- Fund Advisor
- Secondary Advisor
- Fund Representative
- Primary Contact *(Please select only one primary contact on this form.)*

Name Male Female

Mailing Address Home Business

City State Zip

Home Phone Mobile Phone

Business Phone Fax

Email #1 Email #2

Company Name

Title

Date of Birth

DonorConnect - Online Services
Would you like online access to your fund? Yes No
(Online access varies by the role of each contact.)

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Referral Information

Referred to Silicon Valley Community Foundation by

Relationship

If Professional Advisor, Mailing Address

City State Zip

Professional Advisor's Phone Email

Professional Advisor's Company and Title

My Professional Advisor may receive information about the fund.

Successor #1 Information

Name Male Female

Mailing Address Home Business

City State Zip

Home Phone

Business Phone Fax

Email

Relationship to Fund Advisor(s)

Donor Advised Fund Successor Election (Optional)

Fund Advisors establishing a donor advised fund may create a succession plan for the fund.

Individuals named as advisors are authorized to recommend grants and investment allocation changes, change the fund name or appoint additional advisors and successor advisors. The donor and any advisor may designate any person within one generation to be a successor advisor and assign the rights and duties associated with the fund upon an advisor's death or resignation. A successor advisor is authorized to recommend grants from the fund (subject to Silicon Valley Community Foundation's variance power) in the event the fund advisor(s) named above dies, resigns or is otherwise unable or unwilling to act in this capacity. Please indicate a maximum of two successor advisors. Successor advisors must be least 18 years old to recommend a grant. If the successor advisor is under 18 years of age, Silicon Valley Community Foundation will work with the minor's guardian to facilitate grants from the fund.

Successor #2 Information

Name Male Female

Mailing Address Home Business

City State Zip

Home Phone

Business Phone Fax

Email

Relationship to Fund Advisor(s)

I do not wish to name successor advisor(s)

In the event that the initial donor(s) and/or advisor(s) to this fund dies, resigns or is otherwise unable or unwilling to act in this capacity and no successor advisors are named, the balance of the fund will be transferred to the Community Endowment Fund to support community needs.

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Initial Gift to Establish a Fund: \$ _____

- Check made payable to Silicon Valley Community Foundation.
- Stock: # of shares _____
 - Name of Company (*list all if more than one*): _____
 - We will be transferring stock via a financial firm.
 - We will be delivering stock certificates.*
- Other* Please describe the gift (*Real Estate, Wire, Personal Property, Testamentary, Credit Card*): _____
- I would like to make an additional gift of \$ _____ to the Community Endowment Fund.

Total gift to the community foundation \$ _____

**Additional information will be required. Please contact the community foundation at 650.450.5444.*

Anonymity and Publicity

The community foundation includes information about fund advisors, grantees and funds in our e-newsletters, magazine, website and other printed and online materials. If you would like anonymity, please indicate below.

- Do not list my name on donor or fund advisor listings.
- Do not include the name of the fund I advise on fund listings.
- I am willing to be featured in the community foundation's print and online publications.
- I am willing to be interviewed for media stories.

Grantmaking

Custom Grant Letter

Each grant made from an advised fund is mailed with a custom grant letter. This letter's header displays the name of the fund while the fund's advisors are indicated within the body. Please specify below how you would like the advisor(s) to be indicated. *e.g., Mr. and Mrs. Mark Smith, Mark and Jane Smith, The Smith Family, The Eucalyptus Fund*

- Please make all grants from the fund anonymous.

Contact Options by Nonprofits

An organization that has received grants from the fund may wish to send information to you. Please indicate your contact preference for the custom grant letter. (*Please select one.*)

- Provide my home address.
- Provide my business address.
- Do not provide my address.

Mail the community foundation receives for the fund will not be forwarded.

Investment Allocation

- I have completed the attachment regarding investment pool information and allocation.

Special instructions and explanations for named endowed funds, field of interest and designated funds:

Named Endowment Fund

Minimum Initial Gift: \$50,000

A permanent endowed named fund may be created for \$50,000. These funds support the Community Endowment Fund, a permanent charitable resource for the region.

Field of Interest Fund

Minimum Initial Gift: \$10,000

These funds support an area of interest about which the founder or honoree cares deeply. Please describe your field of interest below.

Designated Fund

Minimum Initial Gift: \$10,000

Designated funds are created to support one specific nonprofit and may be endowed or non-endowed. The designated charitable organization must have 501(c)(3) status (or equivalent) and cannot be a private non-operating foundation. Should the organization cease to exist, the community foundation will direct the fund's payout to another organization serving like needs.

Select one:

- Endowed:** the annual payout of 5% of the fund balance will be used to support the following organization: _____
- Expendable:** The annual payout of the dollar amount OR percentage determined below will be used to support the following charitable organization. Distributions will cease to occur if/when assets are expended from the designated fund.

Select distributions of exact dollar amounts OR fund percentage amounts for annual distribution:

\$ _____ to _____
(Name of Organization)

OR

_____ % to _____
(Name of Organization)

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Acknowledgement & Signatures

I acknowledge that I have read the Silicon Valley Community Foundation Fund Support Fees and Minimums and Fund Terms and Conditions and agree to the terms, fees and conditions described therein. I understand any contribution, once accepted by the Silicon Valley Community Foundation board of directors, represents an irrevocable contribution to Silicon Valley Community Foundation. The community foundation board of directors has variance power under IRS regulations, and this gift is not refundable to me.

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

Signature

Print Name

Date

Signature

Print Name

Date

Silicon Valley Community Foundation Signature

Authorized Signature

Title

Print Name

Date

Please mail this form to:

Silicon Valley Community Foundation

Attention: Development Department
2440 West El Camino Real, Suite 300
Mountain View, CA 94040-1498
Phone: 650.450.5400 Fax: 650.450.5401
www.siliconvalleycf.org

Please contact the development department at
donate@siliconvalleycf.org or call 650.450.5444 if you
have questions.

Special Instructions:

- I have remembered the community foundation in my estate plans.
- I would like more information on how to include the community foundation in my estate plans.