

# DONOR-ADVISED FUND APPLICATION

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## DONOR 1

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Name

---

Phone Number

E-mail Address

---

Street Address

---

City

State

Zip

---

Date of birth

Social security number

## DONOR 2

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Name

---

Phone Number

E-mail Address

---

Street Address

---

City

State

Zip

---

Date of birth

Social security number

## SALUTATION

Please indicate how you would like to be addressed on future correspondence, for example, Mr. Frank Brown; Dr. and Mrs. Frank Brown; Frank and Judy Brown.

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Salutation

## IRREVOCABLE CONTRIBUTION

Please list what asset(s) you wish to donate to create your Donor-Advised Fund.

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## FUND INVESTMENT ALLOCATION

Asset allocation details will be provided. After reviewing your options, please provide your asset allocation choice:

- Aggressive
- Aggressive Growth
- Aggressive Growth ESG
- Growth
- Growth ESG
- Growth Income
- Growth Income ESG
- Income Growth
- Income
- High Income

### Please mail this form to:

Anne Doyle  
Senior Director of Gift Planning  
410-516-7954  
adoyle@jhu.edu

## FUND NAME

You can select a name for your fund, like the “Brown Family Fund” or “Fund for Research Innovation.”

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Fund Name

## SUCCESSOR INFORMATION

You may name an individual to succeed you as advisor on the fund for up to 10 years after your life-time(s), with full rights to recommend distributions to charity. This may be done now or at any time before your death. Please see the program brochure for details.

## SUCCESSOR (OPTIONAL)

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Name

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Mailing Address

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City State Zip

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Day Phone Evening Phone

## DONOR SIGNATURE

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Donor 1 Signature Date

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Donor 2 Signature Date

Office of Gift Planning  
San Martin Center, 2<sup>nd</sup> Floor  
3500 San Martin Drive  
Baltimore, MD 21218