

DONOR ADVISED FUND

APPLICATION

DONOR 1

Name		
Phone Number	E-mail Address	
Street Address		
City	State	Zip
Date of birth	Social security number	

DONOR 2

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.

Salutation

FUND NAME

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

Fund Name

IRREVOCABLE CONTRIBUTION

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

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

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)

Name

Mailing Address

City	State	Zip
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Day Phone	Evening Phone
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DONOR SIGNATURE

Donor 1 Signature	Date
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Donor 2 Signature	Date
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Please mail this form to:

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

Office of Gift Planning
6225 Smith Ave, Suite 100-B
Baltimore, MD 21209