

Successor and Substitute Grant Advisors

A grant advisor is the individual or individuals with authority to make recommendations to the Board of Directors on distributions to charity. This is often times the donor(s) at the beginning of the account, but does not need to be. Please indicate below if you would like someone to have that authority in your place or along with you currently. Space is also available to name the grant advisors to succeed you.

Successor or Substitute Advisor may be (a) one or two individuals, including a spouse, relative or other individual, who have reached the age of 18, (b) a corporation or (c) a qualified charity.

A. **Successor Advisors** – You may designate advisors to make recommendations of grants to qualified charities after the death of the surviving Donor.

If you are designating Successor Advisors, check here

B. **Substitute Advisors** – You may designate advisors to serve instead of yourself.

If you are designating Substitute Advisors, check here

(NOTE - Please check only A or B)

1. Name

Relationship to donor, if individual		Social Security or Tax ID no.	
Date of birth		Daytime phone number	
Address			
City	State	Zip Code	Email

2. Name

Relationship to donor, if individual		Social Security or Tax ID no.	
Date of birth		Daytime phone number	
Address			
City	State	Zip Code	Email

If the above advisors will serve one after the other check here but if the above advisors will serve jointly check here
(please check only one)