

**FJC INDIVIDUAL/FAMILY DONOR LETTER AGREEMENT**

Dear FJC:

This is a letter agreement between the undersigned Donor(s) and FJC to establish a Donor Advised Fund under and subject to the FJC Procedures for the Operation of Donor Advised Funds, as these procedures may be amended from time to time. I (we) acknowledge that I (we) have received and read the Summary of Procedures and Rules for Donor Advised Funds.

The name of my (our) fund will be the \_\_\_\_\_ Fund (the "Fund").

I (we) acknowledge that FJC shall have all of the powers needed to carry out its purposes including, without limitation, the following:

- (1) to receive from the Donor(s), or other persons or entities, additional gifts to the Fund;
- (2) to keep, sell, invest and reinvest the assets contributed;
- (3) to commingle for investment purposes the assets contributed, and
- (4) to distribute the contributed assets to organizations within the scope of its guidelines.

I (we) shall have the privilege of making written recommendations with respect to investments of, and distributions from, the Fund. However, I (we) acknowledge that, in accordance with Internal Revenue Service rules and regulations, FJC shall be the absolute owner of the assets of the Fund, and shall have ultimate authority over investments of the Fund, the selection of charities to receive distributions from the Fund, and the timing and amounts of the distributions. I (we) also acknowledge that FJC will distribute funds contributed, and income earned by these funds, generally to charitable organizations described in Sections 501(c)(3) and 509(a)(1), (2), or (3) of the Internal Revenue Code as it now exists or as it may be amended.

My (our) agreement with FJC to establish and maintain the Fund will consist of this Letter Agreement, Summary of Procedures and Rules, and the Donor Application that is attached to this letter. The agreement will be effective once it is accepted and signed by FJC and my (our) contribution has been received and accepted by FJC.

Very truly yours,

\_\_\_\_\_  
Donor Signature\*

\_\_\_\_\_  
Donor Signature\*

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

*\*To accept grant and investment recommendations from a Donor, FJC must have that Donor's signature and contact information on file.*

Accepted by:

**FJC - A Foundation of Philanthropic Funds**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**DESIGNATED FUND ACCOUNT APPLICATION**

**DESIGNATED ORGANIZATION INFORMATION**

Organization and Fund Name

Telephone

Address

Fax

City/State Zip

E-Mail

E. I. Number

Contact (Name/Title)

**Authorized Signatory**

Name

Daytime Telephone

Title

Fax

Address

E-Mail

City/State Zip

Receive Fund Statements:  yes  no

Signature\*

**Authorized Signatory**

Name

Daytime Telephone

Title

Fax

Address

E-Mail

City/State Zip

Receive Fund Statements:  yes  no

Signature\*

*\*In order for FJC to accept distribution instructions from an Authorized Signatory, we must have that Signatory's contact information and signature on file. Please provide the Signatories' Social Security Numbers for security purposes. Unless FJC is notified otherwise in writing, each Signatory shall have the full, equal and independent privilege to direct distributions. For information about the privileges of Authorized Signatories and Designated Organization Representatives, please consult the Summary of Procedures and Rules for Designated Fund Accounts.*

**INITIAL CONTRIBUTION** (\$5,000 Minimum)

**Cash Amount** (To wire funds, please call for wire instructions)

Check: \$	Wire: \$
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**Securities of Publicly Traded Companies** (See enclosed transmittal instructions)

Company	No. Shares

**Other Securities** -- Please contact FJC to discuss contributions of restricted securities and securities of privately held companies.

**Mutual Funds** -- Please contact FJC for transmittal instructions.

**Other Assets** -- Please contact FJC to discuss contributions of other types of property.

**INVESTMENT ALLOCATION RECOMMENDATION** -- You may recommend the allocation of your contribution among the following investment options. If no choices are indicated, the contribution will be invested in the Money Market Fund.

Investment Recommendations	\$ or %
Agency Loan Fund	
Fixed Income - Intermediate Duration	
Growth Fund	
Money Market Fund	
S & P 500 Index Fund	
Socially Responsive Fund	
Value Equities - Domestic	
Value Equities - International	
Total Stock Market Index Fund	
Total	

**HOW DID YOU LEARN ABOUT FJC?**

Referred by: \_\_\_\_\_ Print Advertisement: \_\_\_\_\_

Radio Advertisement: \_\_\_\_\_ Other: \_\_\_\_\_