

Endowment Plan



An Endowment Plan is a succession planning option available for Donor Advised Funds. It allows Fund Advisors to establish annual charitable distribution instructions that will become effective only upon activation of the Fund's succession plan.

Once effective, iGiftFund will administer annual charitable distributions in accordance with this Endowment Plan and the iGiftFund Donor Advised Fund Program Description & Guidelines.

FUND INFORMATION

FUND NAME	FUND NUMBER (if known)
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ANNUAL DISTRIBUTION METHOD

☐ **OPTION A – PERCENTAGE-BASED DISTRIBUTION (LEGACY)**

This method provides annual charitable distributions based on a percentage of the Fund balance, creating a lasting charitable legacy by supporting the causes you care about for years to come.

ANNUAL DISTRIBUTION RATE %	DISTRIBUTION MONTH	BEGINNING YEAR
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Note: This option is available for Funds with a minimum balance of **\$100,000**.
Minimum annual distribution: **\$500**

Annual distributions will be allocated among the designated charitable organizations according to the **Distribution Allocation (%)** specified for each organization.

☐ **OPTION B – FIXED ANNUAL DISTRIBUTION**

This method provides annual fixed-dollar charitable distributions.

The Annual Distribution Amount, Distribution Month, and Beginning Year will be specified for each designated charitable organization.

ORGANIZATION 1

If Option A was chosen:

ALLOCATION PERCENTAGE	%
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If Option B was chosen:

ANNUAL DISTRIBUTION AMOUNT	
DISTRIBUTION MONTH	BEGINNING YEAR

Charity Information

LEGAL NAME		EIN (if known)	
STREET			
CITY		STATE	ZIP
WEBSITE		PREFERRED PHONE	
GRANT PURPOSE (if not specified, Unrestricted Gift will be used)			

GRANT RECOGNITION ☐ Donor Name & Fund Name ☐ Fund Name Only ☐ Anonymous

ORGANIZATION 2

If Option A was chosen:

ALLOCATION PERCENTAGE	%
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If Option B was chosen:

ANNUAL DISTRIBUTION AMOUNT	
DISTRIBUTION MONTH	BEGINNING YEAR

Charity Information

LEGAL NAME		EIN (if known)	
STREET			
CITY		STATE	ZIP
WEBSITE		PREFERRED PHONE	
GRANT PURPOSE (if not specified, Unrestricted Gift will be used)			

GRANT RECOGNITION ☐ Donor Name & Fund Name ☐ Fund Name Only ☐ Anonymous

ORGANIZATION 3

If Option A was chosen:

ALLOCATION PERCENTAGE	%
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If Option B was chosen:

ANNUAL DISTRIBUTION AMOUNT	
DISTRIBUTION MONTH	BEGINNING YEAR

Charity Information

LEGAL NAME		EIN (if known)	
STREET			
CITY		STATE	ZIP
WEBSITE		PREFERRED PHONE	
GRANT PURPOSE (if not specified, Unrestricted Gift will be used)			

GRANT RECOGNITION ☐ Donor Name & Fund Name ☐ Fund Name Only ☐ Anonymous

ORGANIZATION 4

If Option A was chosen:

ALLOCATION PERCENTAGE	%
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If Option B was chosen:

ANNUAL DISTRIBUTION AMOUNT	
DISTRIBUTION MONTH	BEGINNING YEAR

Charity Information

LEGAL NAME		EIN (if known)	
STREET			
CITY		STATE	ZIP
WEBSITE		PREFERRED PHONE	
GRANT PURPOSE (if not specified, Unrestricted Gift will be used)			

GRANT RECOGNITION ☐ Donor Name & Fund Name ☐ Fund Name Only ☐ Anonymous

ORGANIZATION 5

If Option A was chosen:

ALLOCATION PERCENTAGE	%
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If Option B was chosen:

ANNUAL DISTRIBUTION AMOUNT	
DISTRIBUTION MONTH	BEGINNING YEAR

Charity Information

LEGAL NAME		EIN (if known)	
STREET			
CITY		STATE	ZIP
WEBSITE		PREFERRED PHONE	
GRANT PURPOSE (if not specified, Unrestricted Gift will be used)			

GRANT RECOGNITION ☐ Donor Name & Fund Name ☐ Fund Name Only ☐ Anonymous

ACKNOWLEDGMENTS

By signing below: I/We acknowledge and agree to the following:

- This Endowment Plan is established as part of the Fund's succession plan and will become effective only upon activation of the Fund's succession plan.
- Once effective, iGiftFund will administer annual charitable distributions in accordance with this Endowment Plan and the Donor Advised Fund Program Description & Guidelines.
- The charitable organizations and annual distribution instructions established in this Endowment Plan are intended to remain in effect after the Plan becomes effective, except as otherwise provided in the Donor Advised Fund Program Description & Guidelines.
- Annual charitable distributions will be made only to charitable organizations that qualify to receive distributions under applicable law and iGiftFund policies at the time each distribution is made.
- If a designated charitable organization is no longer eligible, no longer exists or cannot otherwise receive a grant, iGiftFund will determine how that portion of the fund will be distributed in accordance with the Donor Advised Fund Program Description & Guidelines.
- iGiftFund retains exclusive legal control and discretion over all Fund assets and charitable distributions.

DONOR PRIMARY ADVISOR (DPA)

PRINTED NAME	DATE	SIGNATURE

JOINT ADVISOR
(if applicable)

PRINTED NAME	DATE	SIGNATURE