Succession Plan

The Signatry
A Global Christian Foundation

The Signatry recommends all fund holders name a successor to their Donor Advised Fund. A succession plan allows you to create a lasting legacy, even after the last advisor on the fund has passed. A succession plan can be as simple or as detailed as you wish.

Successor Options

Convene – Pass on your fund to one or multiple successor advisors

Multiply Impact – Split your fund into multiple funds so that each successor advisor has their own fund from which they can grant to their favorite charities

Cause First – Leave your fund to charities of your choice

Hybrid – Designate a portion of your fund to be managed by successor advisor(s) and designate a portion to go to specific charity beneficiaries.

These are the four most common choices for fund succession, but beyond these options, you may tailor the fund's legacy to your individual wishes. To create a more in-depth plan, contact The Signatry at donorcare@thesignatry.com or call 913-310-0279.

Fund Information

Fund Name

Fund Number

Succession Plan Set Up

____% Total % of Account Designated for **Successors**

____% Total % of Account Designated for **Charities**

100% Total

Successor Information

Successor

Choose one:

☐ **Successor advisor** ☐ **Charity Beneficiary**

Full Name

Address

Street

City State Zip

Primary Phone ☐ Home ☐ Cell ☐ Business

Email Address

Date of Birth (if individual)

Relation (if individual)

Website (if organization)

Successor

Choose one:

☐ **Successor advisor** ☐ **Charity Beneficiary**

Full Name

Address

Street

City State Zip

Primary Phone ☐ Home ☐ Cell ☐ Business

Email Address

Date of Birth (if individual)

Relation (if individual)

Website (if organization)

Succession Plan

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The Signatry — A Global Christian Foundation

Successor

Choose one:

☐ **Successor advisor** ☐ **Charity Beneficiary**

Full Name

Address

Street

City State Zip

Primary Phone ☐ Home ☐ Cell ☐ Business

Email Address

Date of Birth (if individual)

Relation (if individual)

Website (if organization)

Successor

Choose one:

☐ **Successor advisor** ☐ **Charity Beneficiary**

Full Name

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Full Name

Address

Street

City State Zip

Primary Phone ☐ Home ☐ Cell ☐ Business

Email Address

Date of Birth (if individual)

Relation (if individual)

Website (if organization)

For each successor advisor listed, I would like to do the following:

☐ Split the fund into new donor advised funds for each successor

☐ Keep the fund as one donor advised fund with a single/multiple successor(s)

To create a more in-depth succession plan, contact The Signatry at donorcare@thesignatry.com or call 913-310-0279.

Acknowledgment

By signing below: (1) I, the undersigned donor, understand that all gifts to this fund are irrevocable and nonrefundable gifts to The Signatry for charitable purposes; (2) I acknowledge that I have read and agree to this Form and The Signatry User Agreement (which includes details regarding the terms used in this Application, the parties' roles and responsibilities, limitations of liability, an arbitration clause (including a class action waiver), indemnification of The Signatry, and other terms and conditions) which are available on The Signatry's website (at thesignatry.com/agreement) or upon request; (3) I certify that, to the best of my knowledge, all information I have provided is accurate and I will notify The Signatry promptly of any changes; and (4) I also understand that my capacity as a Donor is advisory in nature and that The Signatry has the sole and exclusive authority and discretion to invest and disburse the property transferred.

Signature

Printed Name of Donor | Date

Signature

Printed Name of Donor | Date