

Donor Advised Fund (DAF) Worksheet

Fund Name

A fund name becomes a lasting part of your charitable legacy—appearing on correspondence and, with permission, on grant listings and other Foundation materials. *Fund names are subject to Foundation approval, and the Foundation team can offer naming suggestions or select a name on your behalf if you prefer.*

Please provide two fund name preferences:

Example: "Smith Family Charitable Fund" or "John and Jane Smith Charitable Fund"

1. Fund Name (first preference): _____
2. Fund Name (second preference): _____

Fund Advisor Information

Fund Advisors have shared, equal advisory privileges for the Donor Advised Fund, allowing each to recommend grants to Catholic parishes, schools, ministries, or other approved nonprofits through the Foundation. *All grant recommendations are subject to Foundation review and approval.*

Please provide contact information for all desired Fund Advisors:

Fund Advisor 1

1. Full Legal Name (*with middle initial/name*): _____
2. Date of Birth: _____
3. Address: _____
4. Email: _____
5. Phone: _____

Fund Advisor 2 (*Optional*)

1. Full Legal Name (*with middle initial/name*): _____
2. Relationship to Advisor 1: _____
3. Date of Birth: _____
4. Address (*if different*): _____
5. Email: _____
6. Phone: _____

Successor Advisor Information (*Optional*)

Many donors choose to name Successor Advisors as a meaningful way to involve their family or the next generation in their faith-filled charitable giving. Upon the death, incapacity, or release of privilege of the last surviving Advisor, one or more Successors may be named to assume advisory privileges for the Fund.

Similar to Advisors, Successor Advisors share equal privileges, giving each the ability to recommend grants to Catholic nonprofits from the Fund through the Foundation. *All grant recommendations are subject to Foundation review and approval.*

Please provide contact information for all desired Successor Advisors:

Each Successor Advisor must be at least 18 years of age when named. Successor Advisor designations can be updated or added later as family circumstances change.

Successor Advisor 1 (Optional)

1. Full Legal Name (with middle initial/name): _____
2. Relationship to Advisor(s): _____
3. Date of Birth: _____
4. Address: _____
5. Email: _____
6. Phone: _____

Successor Advisor 2 (Optional)

1. Full Legal Name (with middle initial/name): _____
2. Relationship to Advisor(s): _____
3. Date of Birth: _____
4. Address: _____
5. Email: _____
6. Phone: _____

Beneficiary Endowment Fund

The Foundation asks each Donor Advised Fund to name at least one beneficiary endowment fund managed by the Foundation. Any remaining assets in the DAF will be added to these funds upon the death, incapacity, or release of privilege of the last surviving Successor Advisor (*or Advisor, if no Successors are named*).

Many donors choose to continue their legacy by supporting their parish endowment, a Catholic school, or another fund that reflects their faith and interests. You can explore all existing endowment funds by pillar—Parish Life, Catholic Education, Vocations, and Community—and find a complete list at www.ccfnei.org/give.

If you don't have a specific preference, the *Mission Impact Fund* is a wonderful option—it is an unrestricted endowment fund supporting the greatest needs of parishes, schools, and ministries throughout the diocese.

You may also choose to roll your DAF into a permanent named endowment fund (*currently a \$10,000 minimum*), ensuring your charitable vision continues to bless future generations.

Please use the space below to designate one or more beneficiary endowment funds:

The percentages you list should add up to 100%.

Parish Endowment Fund (name/city): _____	_____ %
Fund Name: _____	_____ %
Fund Name: _____	_____ %
Fund Name: _____	_____ %
Mission Impact Fund (<i>unrestricted, supports greatest needs within parishes, schools, ministries</i>)	_____ %
Please contact me about establishing a named endowment fund.	_____

Please return the completed worksheet by email to info@ccfnei.org or by mail to the Catholic Community Foundation, 334 E. Berry St., Fort Wayne, IN 46802. For assistance, please call 260-399-1436.