

Change Form: Donor-Advisor Contact Information

Current Donor Information:

First name		Last name	
Fund name		Fund ID	
Email		Phone	
Address			
City		State	Zip Code

Updated Donor Information:

First name		Last name	
Email		Phone	
Address			
City		State	Zip Code

Signature(s) *(Must be signed by each Donor-Advisor on fund)*

By executing this change form, the donor-advisor understands that the information on this form controls over any previously submitted conflicting information. Any previously submitted applications or change forms are hereby superseded by this form as of the date of execution.

Donor- Advisor Signature	Date
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Donor- Advisor Signature	Date
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Please remit to:

American Endowment Foundation
 5700 Darrow Road, Suite 118, Hudson, OH 44236
donorchanges@aefonline.org

Change Form: Financial Advisor

Donor Information:

First name		Last name	
Fund name			Fund ID
Email		Phone	
Address			
City		State	Zip Code

Please select an action:

Add Financial Advisor
 Remove Financial Advisor

Authorize Granting Privileges to Financial Advisor

Note: If removing a financial advisor, you must add a new financial advisor in the next section.

Financial Advisor Information:

First name		Last name	
Organization			
Email		Phone	
Address			
City		State	Zip Code

Signature(s) (Must be signed by each Donor-Advisor on the fund)

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Donor- Advisor Signature	Date
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Donor- Advisor Signature	Date
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Please remit to:

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donorchanges@aefonline.org

Change Form: Successor Advisor

Donor Information:

First name		Last name	
Fund name			Fund ID
Email		Phone	
Address			
City		State	Zip Code

Please select an action: One addition or deletion per form

Add Successor-Advisor
 Remove Successor-Advisor

Note: If removing the last or only Successor Advisor, you must add a new one or use the Donor Advised Fund Change Form: Disposition Plan Information to create a disposition plan.

Successor-Advisor Information

First name		Last name	
Email		Phone	
Address			
City		State	Zip Code

Signature(s) *(Must be signed by each Donor-Advisor on fund)*

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Donor- Advisor Signature	Date
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Donor- Advisor Signature	Date
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5700 Darrow Road, Suite 118, Hudson, OH 44236

donorchanges@aefonline.org

Change Form: Donor-Advisor

Donor Information:

First name	Last name		
Fund name		Fund ID	
Email		Phone	
Address			
City	State	Zip Code	

Please select an action: One addition or deletion per form	

<input type="checkbox"/> Add Donor-Advisor	<input type="checkbox"/> Remove Donor-Advisor

Donor-Advisor Information:

First name	Last name		
Email		Phone	
Address			
City	State	Zip Code	

Signature(s) *(Must be signed by each Donor-Advisor on fund)*

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Donor- Advisor Signature	Date
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Please remit to:

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donorchanges@aefonline.org

Change Form: Fund Name

Donor Information:

First name	Last name		
Fund name		Fund ID	
Email		Phone	
Address			
City	State	Zip Code	

Fund Name Rules:

Donor Fund Name cannot begin with the word "The" (AEF will automatically insert "The" at the beginning of each fund name). The Donor Fund Name cannot contain the following: &, FBO, For the Benefit of, any variation of American Endowment Foundation (including AEF or American Endowment), Trust (including CRT, CRUT, Unitrust, Charitable Trust, and Charitable Remainder Trust), Private Foundation, Annuity, Contribution, Grantee, Legacy, Scholarship, or Memorial.

Change Fund name to the following:

Old Fund Name:
New Fund Name:

Signature(s) *(Must be signed by each Donor-Advisor on fund)*

By executing this change form, the donor-advisor understands that the information on this form controls over any previously submitted conflicting information. Any previously submitted applications or change forms are hereby superseded by this form as of the date of execution.

Donor- Advisor Signature	Date
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Donor- Advisor Signature	Date
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Change Form: Disposition Plan Information

Donor Information:

First name	Last name	
Fund name	Fund ID	
Email	Phone	
Address		
City	State	Zip Code

Change Fund Disposition Plan to the following:

- I/We recommend the Fund to continue on and make grants annually to the following charitable organizations (please describe/attach additional information if needed) – be sure to provide full address and phone number as well as the amount to grant per organization.
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- I/We recommend the Fund to terminate and the proceeds to be granted to the following charitable organizations (please describe/attach additional information if needed) – be sure to provide full address and phone number, as well as the amount of the grant per organization.
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- I/We recommend the following customized disposition plan for the fund (please describe/attach additional information if needed) – be sure to provide full address and phone number, as well as the amount of the grant per organization.
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- I/We recommend the Fund to continue, with AEF's Board of Directors, using its discretion, awarding grants to worthy charitable organizations based on our granting history.

Please note: Donor Advised Funds must have either Successor Advisor or Disposition Plan, but not both.

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