

APPENDIX V: UNITED JEWISH FOUNDATION OF DETROIT DONOR ADVISED FUND APPLICATION

Thank you for your interest in establishing a Donor Advised Fund with the United Jewish Foundation of Detroit. We are proud of our history of helping donors fulfill their charitable interests. After completing this form, please return it to the United Jewish Foundation of Detroit, P.O. Box 2030, Bloomfield Hills, MI 48303-2030, or email to brown@jewishdetroit.org.

Today's Date _____

Donor Info

Mr. / Mrs. / Ms. / Dr. _____

Mr. / Mrs. / Ms. / Dr. _____

Address _____

City/State/ZIP _____

Phone: Home (____) _____ Other (____) _____

Email address _____

Date of Birth ____/____/____

Fund Name

Proposed name of the fund:

_____ Donor Advised Fund

Designee to the Fund - Optional

Please list the initial designee to the fund (if different than Donors(s)).

Mr. / Mrs. / Ms. / Dr. _____

Address _____

City/State/ZIP _____

Phone: _____ Home (____) _____ Other (____) _____

Email address _____

Date of Birth ____/____/____

SUCCESSOR DESIGNEEES

If you would like to have Successor Designees for your fund, please complete the following information. Designees can be the donor and, if desired, the donor's children.

Please check here if you would like current copies of your statements sent to your Successor Designees during your lifetime.

SUCCESSOR DESIGNEEES TO SERVE (CHECK ONE):

☐ Concurrently

☐ Consecutively (if consecutively, list below in order of succession)

Mr. / Mrs. / Ms. / Dr.

Address _____

City/State/ZIP _____

Phone: Home (____) _____ Other (____) _____

Email address _____

Date of Birth ____/____/____

I authorize you to discuss this account with:

Mr. / Mrs. / Ms. / Dr.

Address _____

City/State/ZIP _____

Phone: Home (____) _____ Other (____) _____

Email address _____

Date of Birth ____/____/____

RECOMMENDED INVESTMENT STRATEGY

Please indicate which investments you recommend for your fund.

INVESTMENT CATEGORY	FUND	%
United Jewish Foundation	Broadly diversified growth-oriented portfolio with 40+ managers and a 40% target allocation to alternative investments (30% private and 10% low Beta hedge funds). The target asset allocation is 80% Growth Assets and 20% Risk Reduction assets.	____%
Balanced Investment Portfolio		
United Jewish Foundation	Portfolio is invested in the broad bond market with investments in U.S. government and high quality corporate and mortgage-backed bonds.	____%
Fixed Income Investment Portfolio		
Short-Term Cash Fund	Federated Hermes Government Obligations Fund	____%
	Symbol: GOFXX	
U.S. Stock Index Fund	Vanguard Total Stock Market Index Fund	____%
	Symbol: VITSX	
U.S. Active Large Cap Stock Fund	Independent Franchise Partners	____%
	US Equity Fund	
	Symbol: IFPUX	
U.S. Aggressive Growth Stock Fund	Conestoga SMID Cap Fund	____%
	Symbol: CCSGX	
Non-U.S. Stock Fund	American Funds Europacific Growth Fund	____%
	Symbol: AEPGX	
Socially Responsible Investment Option	RBC Global Opportunities Fund	____%
	Symbol: RGORX	
Israel Impact Focused Investment Option	VanEck Vectors Israel ETF	____%
	Symbol: ISRA	
	Total (must add up to 100%)	____%

YOUR SIGNATURE(S)

Please sign and date:

Donor _____

Date _____

Donor _____

Date _____

THANK YOU! WE LOOK FORWARD TO WORKING WITH YOU.