



## Donor Advised Fund Agreement

Date: \_\_\_\_\_

Donor(s) Name: \_\_\_\_\_

Donor(s) Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Donor(s) Home Phone: \_\_\_\_\_ Donor(s) Work/Cell Phone: \_\_\_\_\_

Donor(s) Email: \_\_\_\_\_

Name of Fund: \_\_\_\_\_

(Note: Name of Fund is included on all checks to beneficiaries. Consider the name carefully if you wish anonymity.)

Please check one:

- This is a perpetual fund where only income will be distributed to charities.
- Income and possibly principal will be distributed to charities.

Initial (Default) Beneficiaries:

\_\_\_\_\_ % to \_\_\_\_\_ (Charity)

For \_\_\_\_\_ (Designation)

\_\_\_\_\_ % to \_\_\_\_\_ (Charity)

For \_\_\_\_\_ (Designation)

(For additional beneficiary information, please attach an additional page.)

Special

Instructions: \_\_\_\_\_

The undersigned acknowledge that (I) we understand the following concerning our suggested distributions:

1. A majority of distributions will be made to Christian organizations who are devoted to promoting Kingdom ministries.
2. None of the distributions can be directed to a person, to an organization from which the donor will benefit by the gift, toward any pledge or personal obligation made by the donor(s), or to a non-U.S. charity (unless approved ahead of time by the Foundation Board).
3. The Foundation Board has the final authority in determining whether to authorize any suggested changes in charitable beneficiaries.

**By signing below, I (we) affirm that I have read and agree to the current Foundation Policies and any future changes that are approved by the Foundation Board. Also, I (we) affirm that I have read and understand the Foundation's Disclosure Statement.**

\_\_\_\_\_  
Signature of Donor #1

\_\_\_\_\_  
Signature of Donor #2

**Note:** After completing form, please print, sign and mail to the Southern Baptists of Texas Foundation (4025 Woodland Park Blvd, Ste. 380 Arlington, TX 76013) with your initial check contribution (minimum \$2,500) to the Fund. If the initial contribution is not a check, please call the Foundation for instructions (toll-free 844-351-8804).