



American Endowment Foundation Donor Advised Fund Change Form

Current Donor-Advisor Information

Contact information does not change Update contact information to the following:

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

Please select from the following (attach additional information if needed):

I wish to **ADD** with full privileges or read/view only or **UPDATE** Advisor Contact Info or
 REMOVE (terminate all fund access) As a Donor Advisor Successor Interested Party
 Financial Advisor

First Name		Last Name	
Relation to Donor	E-mail Address		
Address			
City	State	Zip Code	Phone

I wish to **ADD** with full privileges or read/view only) or **REMOVE** (terminate all fund access)
As a Donor-Advisor Successor Interested Party Financial Advisor

First Name		Last Name	
Relation to Donor	E-mail Address		
Address			
City	State	Zip Code	Phone

Change Fund Name to the following:

OLD Fund Name

NEW Fund Name

Change Fund Disposition Plan to the following:

I/We recommend the Fund to continue on, making grants annually to the following charitable organizations (please describe / attach additional information if needed.)

I/We recommend the Fund to terminate, and the proceeds be granted to the following charitable organizations (please describe / attach additional information if needed.)

I/We recommend the following customized disposition plan for the fund (please describe / attach additional information if needed.)

Signature(s)

Donor-Advisor Signature	Date
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Donor-Advisor Signature	Date
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Please remit to AEF. AEF will confirm receipt of changes.
American Endowment Foundation
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Hudson, OH 44236