

DONOR INFORMATION

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

I/We recommend the Fund to terminate and the proceeds to be granted to the following charitable organizations.
(Proceeds granted to Selected Charities Listed Below)

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

I/We recommend the Fund continues with annual grants to selected charitable organizations.
(Annual Grants to Selected Charities Listed Below)

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

Name	Dollar Amount	Phone	
Address	City	State	Zip

I/We recommend a customized disposition plan - You are required to attach a Detailed custom plan document for review by AEF. *(The attached document needs to be signed by the Donor(s))*

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.

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

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 Any previously submitted applications or change forms are hereby superseded by this form as of the date of execution.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 _____

Donor-Advisor Signature _____ Date _____

PLEASE REMIT TO:

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