



EXHIBIT C

<name> FUND

SUCCESSOR ADVISOR DESIGNATION

Please use this space to provide more details about your charitable interests or to convey your wishes for the future. You may wish to check one of the statements below.

- Upon the death of the original Advisor(s), this fund shall be advised by the Board of Trustees of the Community Foundation for the benefit of the community.
- I (We) intend to use this fund for current charitable giving and have not made future plans for the fund at this time.

DONOR:

By: \_\_\_\_\_

\_\_\_\_\_  
Date

COMMUNITY FOUNDATION OF WESTERN NEVADA

A Nevada Nonprofit Corporation

By: \_\_\_\_\_  
Chris Askin, President & CEO

\_\_\_\_\_  
Date



COMMUNITY  
FOUNDATION  
*of Western Nevada*

## EXHIBIT C

(EXAMPLE ONLY)

### SUCCESSOR ADVISOR DESIGNATION

Please use this space to provide more details about your charitable interests or to convey your wishes for the future. You may wish to check one of the statements below.

Upon the deaths of both John and Sarah Jones, the Jones Family Fund is to be divided into two equal funds: one to be assigned to and advised by our son, Robert C. Jones, and the other to be assigned to and advised by our daughter, Michelle J. Thomas. These funds are to be endowed, with an annual payout in line with the Community Foundation of Western Nevada's guidelines. The funds are intended to support the organizations and causes that our children care about through the annual payouts.

DONOR:

By: \_\_\_\_\_

\_\_\_\_\_  
Date

COMMUNITY FOUNDATION OF WESTERN NEVADA

A Nevada Nonprofit Corporation

By: \_\_\_\_\_  
Chris Askin, President & CEO

\_\_\_\_\_  
Date



COMMUNITY  
FOUNDATION  
*of Western Nevada*

## EXHIBIT C

(EXAMPLE ONLY)

### SUCCESSOR ADVISOR DESIGNATION

Please use this space to provide more details about your charitable interests or to convey your wishes for the future. You may wish to check one of the statements below.

Upon my death, it is my desire that my Successor Advisors, as named in the fund agreement, advise this endowed fund according to the following guidelines:

50% of the annual payout will be directed to charitable organizations within Washoe County, and

50% of the annual payout may be directed to any charitable organization the Successor Advisors wish to support, regardless of location.

DONOR:

By: \_\_\_\_\_

\_\_\_\_\_  
Date

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\_\_\_\_\_  
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Further description of Fund's intended charitable purposes.

Upon receipt of funds, the following grants are to be made immediately:

1. Be Instrumental Arts Fund at Community Foundation of Western Nevada	\$50,000.00
2. ABC Organizational Endowment Fund	\$50,000.00
3. XYZ Charity	\$50,000.00
4. Community Fund at the Community Foundation of Western Nevada	<u>\$50,000.00</u>
Total	\$200,000.00

After these grants are made, the remaining balance is to be endowed and the annual 4% payout is to be distributed among the same organizations listed above in the percentages shown below. If any one of these organizations ceases to exist, that organization's share is to be divided proportionately among the other organizations.

1. Be Instrumental Arts Fund	25%
2. ABC Organizational Endowment Fund	25%
3. XYZ Charity	25%
4. Community Fund	<u>25%</u>
Total	100%

DONOR:

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

COMMUNITY FOUNDATION OF WESTERN NEVADA

A Nevada Nonprofit Corporation

By: \_\_\_\_\_  
Chris Askin, President & CEO Date



**COMMUNITY  
FOUNDATION**  
*of Western Nevada*

Example of direction letter you can write to the Community Foundation with your wishes:

January 1, 2017

Chris Askin, President & CEO  
Community Foundation of Western Nevada  
1885 S. Arlington Ave., Suite 103  
Reno, NV 89509

Re: Jones Family Fund

Dear Chris,

Our desire is that, upon the deaths of both Sarah Jones and John Jones, the Jones Family Fund at the Community Foundation of Western Nevada be endowed. The annual payout on the endowment should be set according to the policies of the Community Foundation and distributed as follows:

Education – 15%

1. 10% to XYZ Community College for scholarships
2. 5% to ABC charity for education

Human Services – 25%

1. 12.5% to DEF charity for kids' programming
2. 12.5% to GHI charity, or similar program serving impoverished populations

Arts & Culture – 20%

1. 5% to JKL charity
2. 5% to MNO charity
3. 10% to PQR charity

Natural Resources & Environment – 20%

1. 10% to STU charity
2. 10% to VWX charity

Community Foundation of Western Nevada – 20%

1. 20% to the Community Fund at the Community Foundation of Western Nevada

In the event that one of these organizations ceases to exist, please spread the assigned gift percentage among the other organizations designated above. Thank you.

Regards,

John and Sarah Jones