

Legacy Giving Recommendation

RAYMOND JAMES Charitable


RJ Charitable

02785

Form #

FA #

Service Center

Scan / eSign 

Branch #

ACCOUNT INFORMATION

RJ Charitable DAF Account Name

DAF Fund ID# (Leave blank if submitting this form with a Planned Gift account application)

DAFs have two options for succession. One is to name a person(s) as successor, the other is to instead recommend one or more charities. Use this form to recommend one or more charities as the succession plan. (Please note that donor advisors may not name both charities and individuals to serve as successors at the same time.)

The donor advisor(s) desire to support the following organization(s) beyond their lifetime. The donor advisors understand this information will be used as guidance for the administration of the above named account after the death of the last surviving donor advisor to the account. The donor advisors understand they may request a change to this information at any time during their lifetime.

- This form is the initial Legacy Giving Recommendation for the DAF account.
- This form is to REPLACE the current Legacy Giving Recommendation(s) on the existing DAF account.
- This form is to REPLACE the current individual(s) named as successor(s) with the named charity(s) below on the existing DAF account.

One form per charity to be named is required.

CHARITY INFORMATION - Charity _____ of _____ (i.e. 1 of 5) total charities to receive a gift from this account.

Name of Charity

Purpose of Grant (e.g., general use, building fund)

Charity's Federal Tax ID #

Phone Number

Street Address

City

State

Zip

Contact Name (if available)

Contact Email Address

Charity Website (if available)

GRANT INFORMATION

- One time grant of \$ _____ **OR** _____ %
 - Continuing grant amount of (minimum \$100):
 - \$ _____ (amount per distribution)
 - _____ % (calculated annually)
- Paid in: Quarterly Installments **OR** Paid in: Quarterly Installments
- Semiannual Installments Semiannual Installments
- Annual Installments Annual Installments

If the account balance should be distributed within a certain number of years, please indicate that here: _____ # of Years
(For example, if you select 5% in annual installments above, and then indicate 10 years; we will distribute 5% of the balance for 9 years, and then distribute the remaining balance in the 10th year and close the account).

The first year's grant distribution will commence as soon as is reasonably possible. The second and ongoing grant distributions will then be based on the subsequent 12/31 balance. Please note, if the DAF is named as beneficiary on the donor's other accounts (i.e. IRA, trust, annuity, etc.), the grant distributions will not commence until all funding is received. If any charity's portion is less than the minimum grant amount of \$100, the grant will be increased to meet the minimum requirement. Please consult your financial advisor to ensure your investment selection and time horizon for grant distributions is in alignment. If any of the recommendation details provided do not account for all funds in the account, any remaining balance will be distributed at the discretion of the board of trustees.

CHARITY SUBSTITUTION RECOMMENDATION

If the above charity is not in existence at the time of the distributions, such charity's grant shall be:

- Reallocated, pro-rata, to the other charities named.
- Distributed to the contingent charity named below

CONTINGENT BENEFICIARY

If the charity named above is not in existence at the time of distribution, the grants shall be distributed to:

Name of Contingent Charity

Charity's Federal Tax ID # (if available)

Street Address

City

State

Zip

Charity Website (if available)

ACKNOWLEDGEMENT INFORMATION

The approved grant to the charity will be accompanied with a letter recognizing the gift by listing the name of the DAF account.

- Check here, the gift should instead be made anonymously.

CERTIFICATION

The donor advisor(s) certify that neither the donor advisors on this account or anyone related to the donor advisors will receive any benefit from the recommended charitable organization (e.g., the donor advisor is not paying for membership fees, dues, tuition, benefit tickets, goods bought at auction, etc.) by way of this grant if distributed, and the grant does not fulfill a pledge to the recommended charitable organization. The donor advisor(s) understand that the donor advisor will not be entitled to a tax deduction when the grant is made.

By signing below, the financial advisor confirms that the financial advisor is submitting the above recommendation at the request of and on behalf of the donor advisor(s) of the above-named DAF account.

Donor Advisor Signature

Date

Joint Donor Advisor Signature

Date

Name (please print)

Name (please print)

Financial Advisor Signature

Date

Please contact RJCHARITABLE@RAYMONDJAMES.COM or 866-687-3863 or ext. 77221 with any questions.