



**THE COMMUNITY FOUNDATION**  
*of Southeastern Connecticut*

**NON-ENDOWED DONOR ADVISED FUND AGREEMENT**

**THE \_\_\_\_\_ FUND**

I, \_\_\_\_\_ ("Donor"), irrevocably give the assets listed in Schedule A to The Community Foundation of Southeastern Connecticut ("The Foundation"), a non-stock, charitable corporation, to be held by the Board of Trustees ("Board") of such corporation, for the public, charitable, and educational uses and purposes and upon all of the terms and conditions contained and expressed in, and subject to, the Certificate of Incorporation and By-Laws of the Foundation, for the purpose of establishing The \_\_\_\_\_ Fund ("Fund").

It is my desire that this Fund be established as a non-endowed Donor Advised Fund, whereby The Foundation is requested to consider grant recommendations ("Distribution") made by the Donor at least annually.

If the Donor is no longer willing or able to make suggestions for the Fund, it will become a discretionary \_\_\_\_, field of interest \_\_\_\_, designated fund \_\_\_\_ (check one) for the benefit of \_\_\_\_\_.

It is agreed that the Fund is a component fund of The Foundation. At the time a gift is made, a fee of 1% of the gift amount will be assessed to cover administrative expenses. If it appears to the Board that the Distribution for the purposes described are no longer necessary, capable of fulfillment or consistent with the charitable needs of the community, the Board may at any time direct any Distribution from this Fund be made for general charitable purposes with a preference for fulfilling as nearly as possible the expressed desire of the Donor as stated.

Any person or group may add to this Fund at anytime.

Signed:

By: \_\_\_\_\_  
(Donor) Date

Accepted:

THE COMMUNITY FOUNDATION OF SOUTHEASTERN CONNECTICUT

By: \_\_\_\_\_  
Alice Fitzpatrick, President Date

*A Foundation for Charitable Giving*