



DONOR ADVISED FUND CHANGE REQUEST

This form is used to request changes be made to a Donor Advised Fund you have established. Types of changes that can be requested are:

- Alterations to the Donor Advised Fund name.
- Addition or removal of Donor Advisors. *
- Amendments to the way grant decisions are to be made.
- Alterations to the financial account type the Donor Advised Fund is held in.
- Amending how final grant distributions are to be made.

If you have any questions about what changes can be made, please contact the Trust Officer who helped you establish the Donor Advised Fund.

** Please note, if adding Donor Advisors, you will need to provide their full contact details as well as their relationship to you.*

Which Donor Advised Fund is to be changed?

Please detail the change(s) you would like to be made to this Donor Advised Fund.

Declaration

I hereby reaffirm my understanding and agreement to the original Legacy Ministry Services Donor Advised Fund Agreement and the operation and regulations of the Donor Advised Fund Program.

Signature _____

Print Name _____

Date _____

Signature _____

Print Name _____

Date _____

Please send completed forms to:
Legacy Ministry Services, 2250 Chaney Rd., Dubuque, IA 52001
info@bssmatters.com