OJCF
Oregon Jewish Community Foundation

Donor Advised Fund Agreement

Donor Advised Funds are a meaningful way to provide ongoing support for the organizations and causes you care about most. When you contribute to your Donor Advised Fund ("the Fund"), you may be eligible to receive an income tax deduction for the year of your donation. While contributions to the Fund become the property of OJCF, you may recommend grants to charitable organizations and advise on the Fund's investment strategy. Your Donor Advised Fund can also help build your charitable legacy by naming one generation of successor advisors, such as your children.

1 Name the Fund

Please choose a name for the Fund. Grants made to charities are accompanied by a letter which includes the Fund name (e.g. Samuel L. Cohen Family Fund of OJCF).

The fund name will be the _____ Fund of the Oregon Jewish Community Foundation.

☐ Check here if ALL grants from the Fund are to remain anonymous.

Select one:

☐	Private	When set to private, your fund is not searchable on our website and others cannot contribute to your fund online.
☐	Public	When set to public, your fund is searchable on our website and others can contribute to your fund online.

2 Donor Advisor Information

The Foundation will take recommendations from any advisor, unless the donors appoint an authorized advisor. If you choose to select an authorized advisor, the Foundation will only take recommendations from that person. Indicate who can make recommendations:

☐ Any advisor ☐ Authorized Advisor: _____

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Donor Advisor 1

Full Name (first, middle, last) | Preferred Salutation (Samuel or Sam)

Home Address | Date of Birth

City / State / ZIP | Relationship to other donor advisor(s)

Home Phone | Cell Phone | Email Address

Donor Advisor 2

Full Name (first, middle, last) | Preferred Salutation (Samuel or Sam)

Home Address | Date of Birth

City / State / ZIP | Relationship to other donor advisor(s)

Home Phone | Cell Phone | Email Address

Donor Advisor 3

Full Name (first, middle, last) | Preferred Salutation (Samuel or Sam)

Home Address | Date of Birth

City / State / ZIP | Relationship to other donor advisor(s)

Home Phone | Cell Phone | Email Address

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Donor Advisor 4

Full Name (first, middle, last) _____ Preferred Salutation (Samuel or Sam) _____

Home Address _____ Date of Birth _____

City / State / ZIP _____ Relationship to other donor advisor(s) _____

Home Phone _____ Cell Phone _____ Email Address _____

3 Contributions

The minimum initial contribution is $1,800. Additional gifts can be made in any amount. If contributing multiple securities or assets, please attach pages as needed.

☐ Check for $ _____ ☐ Marketable Securities

#_____ shares of _____

4 Investments

OJCF invests Donor Advised Fund assets in one of our standard portfolios or in a custom portfolio below as selected below. Please choose from one section only.

Standard Portfolios

☐ Balanced* (60% Equity/40% Fixed Income)
☐ Aggressive (75% Equity/25% Fixed Income)
☐ Conservative (40% Equity/60% Fixed Income)
☐ 100% Money Market

**OJCF invests its endowed funds in accordance with the Balanced investment allocation.*

OR

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Custom Portfolio

___ % Equity
___ % S&P 500 Index
___ % Fixed Income
___ % International Equity Index
___ % ESG Equity
___ % ESG Fixed Income
___ % Jewish Advocacy Strategy Pool
___ % Money Market

The Donor Advisor(s) acknowledge and agree that IRS regulations enable Donor Advisor(s) to recommend investment preferences, but investment preferences are subject to the review and approval of OJCF. Thus, OJCF retains final discretion regarding any investment preferences. The Donor Advisor(s) understand that investments will be administered in accordance with OJCF's policies. OJCF will have all powers necessary or desirable to carry out the Purpose, including, but not limited to, the power to retain, invest, and reinvest amounts allocated to the Fund in any manner and the power to commingle the assets of the Fund with those of other funds for investment purposes. The Donor Advisor(s) acknowledge that investments are subject to market and interest rate fluctuation risks, and that any gain or loss generated by the investment of amounts held in the Fund will be credited or charged to Fund.

5 Succession Plan

On the death or incapacity of the Fund's last surviving Donor Advisor, all remaining assets of the Fund will be transferred to the OJCF Community Endowment Fund, which helps to ensure the continuity of the Jewish community in Oregon and SW Washington, unless a selection is made below:

Support organizations directly:

☐ Transfer all the Fund's assets immediately to the organizations named below: (Total should equal 100%)

_____ ____ %
_____ ____ %
_____ ____ %
_____ ____ %
_____ ____ %

☐ Create an Endowed Designated Fund for the benefit of the organization(s) named below: (Total should equal 100%)

_____ ____ %
_____ ____ %
_____ ____ %
_____ ____ %
_____ ____ %

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Designate Successor Advisors:

☐ Transfer Advisory privileges of the Fund to Successor Advisor(s) when all Donor Advisors are unable or unwilling to continue to serve as Donor Advisors.

You may name one generation of Successor Advisor(s). You may change this designation anytime by completing the Donor Advised Fund Chage Form. If you choose, you can limit the Successor Advisor's authority to exercise only those privileges expressly specified by the Donor Advisor.

The Foundation will take recommendations from any successor advisor, unless the Donor Advisor(s) appoint an authorized successor advisor. If you choose to select an authorized successor advisor, the Foundation will only take recommendations from that person.

Indicate who can make recommendations:

☐ Any successor advisor ☐ Authorized Successor Advisor: _____

Successor Advisor 1

Full Name (first, middle, last) _____ Preferred Salutation (Samuel or Sam) _____

Home Address _____ Date of Birth _____

City / State / ZIP _____ Relationship to donor advisor(s) _____

Home Phone _____ Cell Phone _____ Email Address _____

Successor Advisor 2

Full Name (first, middle, last) _____ Preferred Salutation (Samuel or Sam) _____

Home Address _____ Date of Birth _____

City / State / ZIP _____ Relationship to donor advisor(s) _____

Home Phone _____ Cell Phone _____ Email Address _____

Successor Advisor 3

Full Name (first, middle, last) | Preferred Salutation (Samuel or Sam)

Home Address | Date of Birth

City / State / ZIP | Relationship to donor advisor(s)

Home Phone | Cell Phone | Email Address

Successor Advisor 4

Full Name (first, middle, last) | Preferred Salutation (Samuel or Sam)

Home Address | Date of Birth

City / State / ZIP | Relationship to donor advisor(s)

Home Phone | Cell Phone | Email Address

6 Fund Statements

Fund Statements provide a summary of the Fund's assets, fees, and investments. They will be sent by email on a quarterly basis.

7 Administrative Fee Schedule

The Fund will share in the total administrative costs of OJCF. OJCF's administrative fees can be found at https://www.ojcf.org/administrative-fees, which are in effect as of the date of this Agreement. Fees are subject to change from time to time in the sole discretion of OJCF's Board of Trustees. For purposes of this Agreement, the administrative fee charged against the Fund will be subject to the fee schedule Donor Advised Funds and invested in OJCF's investment pools. OJCF's fees are in addition to any financial institution or third-party investment level pool fee or expense. Any expenses incurred by OJCF in accepting, transferring, or managing the Fund or property donated to OJCF for the Fund will be paid or reimbursed from the Fund. OJCF may charge a fee for administering or managing a grant process with respect to the Fund.

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8 Philanthropic Interests

Through our work with community partners and other organizations, we regularly learn about emerging initiatives, programs, and opportunities. We would like to connect you with organizations and causes that align with your charitable priorities. Please select the areas of greatest interest to you, as these preferences may help guide future grantmaking recommendations and philanthropic opportunities.

- ☐ Jewish Life & Community
- ☐ Synagogues
- ☐ Youth Clubs & Camps
- ☐ Pre-k to 12 Education
- ☐ Higher Education
- ☐ Arts, Culture, & Humanities
- ☐ Environment
- ☐ Food, Nutrition, & Agriculture
- ☐ Sports & Recreation
- ☐ Animal Welfare
- ☐ Community
- ☐ Human Rights
- ☐ Civil Rights
- ☐ Mental Health & Crisis Intervention
- ☐ Medical Research
- ☐ Health & Medical Services
- ☐ Persons with Disabilities
- ☐ Social Services
- ☐ Aging & Senior Services
- ☐ Public Safety, Disaster Preparedness, & Relief
- ☐ Veterans & Military
- ☐ Other: _____

9 Signatures

(All Donor Advisors must sign below)

Procedures for Establishment & Operation of Funds

The Donor Advisor(s) have reviewed the Procedures for Establishment & Operation of Funds and Guidelines & List of Charitable Needs (the Procedures) that can be found at OJCF Procedures for Establishment & Operation of Funds. The Fund, and amounts contributed or allocated to the Fund, and amounts distributed from the Fund, are subject to the Procedures and the provisions of OJCF's Articles and Bylaws, as each of the foregoing may be amended or supplemented from time to time in the sole discretion of OJCF's Board of Trustees.

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Component Funds
The Fund is a component fund of OJCF and is separately identified under the name of the Fund. Contributions to the Fund are irrevocable and OJCF is the sole owner of the Fund. The Fund's assets are solely owned by OJCF. The Donor holds advisory privileges and OJCF has exclusive control over the Fund and retains full discretion to accept or reject any recommendation. No distribution from the Fund may confer a benefit to the Donor or Donor Advisor or related party and no goods or services may be accepted by the Donor, Donor Advisor or related party as a result of the grant.

Governing Law
This Agreement will be construed in accordance with the laws of the state of Oregon and to comply with the requirements of federal tax law for allowances of such charitable deductions and for such qualifications.

Variance Power
It is understood that the Donor Advised Fund to be established pursuant to this agreement will be subject to the provisions of the Articles and Bylaws of the Oregon Jewish Community Foundation. In the event that the purpose of the Fund is impossible, impractical or illegal, the Board of Trustees will modify the purpose of the Fund with the consent of the Donor. If the Donor is unable or unwilling to provide such consent, the Board will modify the purpose in a manner that most closely aligns with the original intent of the Donor.

Privacy Policy
The Donor Advisor(s) have reviewed the Privacy Policy that can be found at our website here.

Entire Agreement
This Agreement, the Procedures, the policies, and the documents referenced in this Agreement, comprise the entire agreement between the Donor Advisor(s) and OJCF and supersede any prior agreement, written or oral, between the parties.

Disclaimer
The Donor Advisor(s) acknowledge and agree that OJCF has not and does not provide accounting, tax, investment, financial, or legal advice. The Donor Advisor(s) are encouraged to consult with their own professional advisors before entering into this Agreement and making any contribution to the Fund.

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The Donor Advisor(s) enter into this Donor Advised Fund Agreement effective as of

_____ _____ , _____ .
Month Day Year

Donor Advisor 1

_____
Signature

_____
Printed Name

Donor Advisor 2

_____
Signature

_____
Printed Name

Donor Advisor 3

_____
Signature

_____
Printed Name

Donor Advisor 4

_____
Signature

_____
Printed Name

Oregon Jewish Community Foundation

_____
Executive's Signature

_____
Name / Title

Please print, sign, and return to OJCF or
email us a completed form to request a Docusign.