

ESTABLISH A FUND TO ORGANIZE YOUR CHARITABLE GIVING

To get started, please complete the following information and return to Kern Community Foundation.

Contact Information

Fund Name: _____

Primary Donor Name: _____

Secondary Donor Name (e.g. spouse): _____

Organization Name (if applicable): _____

Address: _____

Phone: _____ Email: _____

Fund Type

Unrestricted Field of Interest Designated* Donor Advised Scholarship

Distributions from the fund should be made from:

Principal and income (non-endowed).

Income only (endowed).

An endowed fund is a permanent fund that will support a favorite charitable issue or organization forever.

Investment Option

Option 1: Choose to work with your with your own financial advisor.

Advisor Name: _____

Advisor Phone: _____ Advisor Email: _____

Option 2: Choose one of the following investment pools.

- | | | |
|--|---|---|
| More Risk
(Long-Term Goals) | <input type="radio"/> Aggressive | Equity, Intermediate-Term Fixed Income, Short-Term Fixed Income |
| | <input type="radio"/> Moderately Aggressive | Equity, Short-Term Fixed Income, Intermediate-Term Fixed Income, Money Market |
| | <input type="radio"/> Moderate | Equity, Short-Term Fixed Income, Intermediate-Term Fixed Income, Money Market |
| | <input type="radio"/> Conservative | Short-Term Fixed Income, Money Market, Intermediate-Term Fixed Income, Equity |
| | <input type="radio"/> Risk Averse | Money Market |
| Less Risk
(Short-Term Goals) | <input type="radio"/> Your Own Mix | = 100% Total |
| | Equity: _____ | Fixed Income: _____ Alternative: _____ Money Market: _____ |

Gift

I will send a check payable to Kern Community Foundation to establish my fund.

Please contact me with instructions on making a gift of stock, real estate, or other assets.

Please contact me with instructions on making a planned gift from my estate.

*If you chose a designated fund, please specify which nonprofit organization(s) the fund will to support: