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## Young Philanthropist Fund Agreement

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Date: \_\_\_\_\_

Pursuant to the terms and conditions of this Young Philanthropist Fund Agreement, delivery is hereby made by the undersigned Donor of the property listed on Schedule “A” and made a part hereof (the “Property”). Delivery of the Property constitutes an irrevocable gift of the Property to the Jewish Federation of Greater Atlanta d/b/a *Atlanta Jewish Foundation* (“the Foundation”) upon acceptance of the Property and with the following terms and conditions:

**1. Establishment of the Fund.** A fund will be established on the books of the Foundation which will be known as:

\_\_\_\_\_ **Fund** (the “Fund”).

**2. Contributions to the Fund.** The Fund will include the Property this day received from said Donor, any property as may from time to time be transferred to the Foundation by the Donor for inclusion in the Fund, or any property received from time to time by the Foundation from any other source and accepted by Foundation for inclusion in the Fund, and all income from the foregoing property. The minimum contribution to open a Young Philanthropist Fund is \$1,000.

**3. Ownership and Control.** The Fund will be the property of the Foundation held by it in its normal corporate capacity; it shall not be deemed a trust fund held by it in a trustee capacity. The Foundation will have the ultimate authority and control over all property in the Fund, and the income derived therefrom, for the charitable, educational, benevolent, and religious purposes of the Foundation.

**4. Purpose.** The Fund will be used only for charitable, educational, benevolent, or religious purposes (or any combination of such purposes) within the purposes of the Foundation, either directly or by contributions to other organizations for such purpose or purposes. The Fund will be administered under and subject to the

Donor-Advised Fund Policies and Procedures and the Atlanta Jewish Foundation Donor-Advised Fund Official Guidebook , all as may be revised from time to time.

**5. Distributions/Grants.** (a) Donor or his or her designated advisor(s) retain the privilege of recommending distributions, or grants, from the Fund. Distributions from the Fund, within the limitations provided for in paragraph 4 above and paragraph 5B below, shall be made at such times, in such amounts, in such ways and for such charitable, educational, benevolent, or religious purposes (or any combination of such purposes) as the Foundation approves. The recommendations with respect to distributions will be solely advisory and Foundation will not be bound by such recommendations. It is the intention of the Donor that the Fund remain at Atlanta Jewish Foundation.

**A. No Benefit Received.** A Donor of a Donor-Advised Fund or any other person may not receive any benefit or privilege in return for a distribution from a Donor-Advised Fund (this includes, for example, tickets to events, meals, auctions, and museum memberships).

**B. Minimum Distributions.** Distributions should be for \$100 or more.

**6. Advisors and Successor Advisors to the Fund.** Subject to the restrictions set forth herein, the individuals named in Schedule “B” maintain the right to recommend distributions.

**7. Investments.** The Fund will be held as cash and not invested. When the Donor reaches 30 years of age, the Fund will be converted to a regular Donor-Advised Fund and, unless different investment choices are made, this Fund will be invested in the most moderate pool investment model available at the time of conversion.

**8. Fees.** The Young Philanthropist Fund will not be charged any fees. When the Donor reaches 30 years of age and the Fund converts to a regular Donor-Advised Fund, those fees set forth on the Foundation’s regularly published schedule of fees in effect from time to time shall apply.

**9. Component Fund.** It is intended that the Fund will be a component part of the Foundation and that nothing in the Agreement will affect the status of Jewish Federation of Greater Atlanta as an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986 (the “Code”) and as an organization which is not a private foundation within the meaning of Section 509(a) of the Code. This

Agreement will be interpreted in a manner consistent with the foregoing intention and so as to conform to the requirements of the foregoing provisions of the Code and any regulations issued pursuant thereto. The Foundation is authorized to amend this Agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. Reference in this Agreement to provisions of the Code shall be deemed references to the corresponding provisions of any future Internal Revenue law.

Kindly indicate below your acceptance of this gift and of the foregoing terms and conditions.

Accepted this \_\_\_\_\_ day of \_\_\_\_\_, 2022.

**DONOR**

**PARENT OR GUARDIAN IF DONOR IS UNDER 18**

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Receipt of the above-described property on this  
date is acknowledged.

**JEWISH FEDERATION OF GREATER ATLANTA, INC. D/B/A ATLANTA JEWISH FOUNDATION.**

By: \_\_\_\_\_  
Eric Robbins  
Chief Executive Officer

By: \_\_\_\_\_  
Jori Mendel  
Chief Foundation Officer

2043438

**SCHEDULE A**

**Listing of property transferred to the Federation to fund a new Young Philanthropist Fund.**

(If funding with cash, please make check payable to Jewish Federation of Greater Atlanta and indicate check number, date and amount.)


## SCHEDULE B

### Advisors and Successor Advisors

**A. Advisors:** Recommendations from the Fund will be made by:

\_\_\_\_\_ and/or \_\_\_\_\_

**B. Successor Advisors/Disposition of the Fund:** Upon the death or disability of all of the above-named individuals, we recommend that:

\_\_\_% Fund assets be retained in the Fund with recommendations to be made by:  
They may establish separate funds.

\_\_\_\_\_ who is my/our \_\_\_\_\_  
Name Relationship

Age: \_\_\_\_\_ Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ E-mail: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_ who is my/our \_\_\_\_\_  
Name Relationship

Age: \_\_\_\_\_ Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ E-mail: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_ who is my/our \_\_\_\_\_  
Name Relationship

Age: \_\_\_\_\_ Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ E-mail: \_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_% Fund assets be transferred to Atlanta Jewish Foundation as a permanent  
Unrestricted Endowment.

\_\_\_% Fund assets be transferred to Atlanta Jewish Foundation as a permanent Endowment  
for the Annual Campaign of Jewish Federation of Greater Atlanta.

\_\_\_% Fund assets be transferred to Atlanta Jewish Foundation as a permanent  
Endowment Fund to benefit specific organizations or areas of interest.

\_\_\_% Fund assets to be transferred to the following organizations in equal shares.  
Organization:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## Section 1: Demographic Data

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### Young Philanthropist Fund Information

The Donor of a fund has full rights to recommend grants and to elect the successors of the fund.

#### Donor

Name	Daytime Phone
Mailing Address	City, State, Zip
E-Mail	
Home Phone	Birth Date

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## Section 2: Your Philanthropic Interests

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**A. Please indicate if you have a charitable interest in the following charitable areas:**

- ☐ Arts & Culture
- ☐ Children & Teens
- ☐ Education
- ☐ Emergency Relief
- ☐ Environment
- ☐ Health/Medical Research
- ☐ Human Rights/Social Action
- ☐ Human Services
- ☐ Israel
- ☐ Jewish Education
- ☐ Overseas
- ☐ Seniors
- ☐ Women & Girls
- ☐ Other \_\_\_\_\_

**C. What organizations locally or nationally do you currently support or otherwise affiliate with?**

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