



## FUND SUCCESSION PLAN

Your account at GuideStream Donor Advised Funds can continue to tell your story and meet the needs of qualified charitable organizations even after you pass away. Please **choose one of the three options below** for the remaining funds in your account (and any funds designated to your account through your estate plan) upon the death of all donors.

### NAME OF ACCOUNT

(e.g. The John and Mary Davis Family Foundation)

**OPTION 1:**

Distribute all remaining funds to the following qualified charitable organizations in the stated percentages (attach additional sheets if needed):

Name of Organization 1: \_\_\_\_\_

Specific Designation (if any): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Percent of Account: \_\_\_\_\_

Name of Organization 2: \_\_\_\_\_

Specific Designation (if any): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Percent of Account: \_\_\_\_\_

Name of Organization 3: \_\_\_\_\_

Specific Designation (if any): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Percent of Account: \_\_\_\_\_

Name of Organization 4: \_\_\_\_\_

Specific Designation (if any): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Percent of Account: \_\_\_\_\_

**OPTION 2:**

Continue the existing recurring distributions for my account at the time of my death until all funds are distributed. PLEASE NOTE: if there are no existing recurring distributions at the time of your death, the GSDAF board will make the final determination for distribution of the account.

