

UPDATE YOUR DONOR-ADVISED FUND

Please complete the applicable sections of this form and return to support@greaterhorizons.org.

Once approved by Greater Horizons, we will return a fully signed copy to you.

1 Your Fund

Name of Fund

Fund ID

2 Changing Fund Name

New Name of Fund

3 Adding or Removing a Fund Advisor

Fund Advisors make recommendations for all Fund-related matters, including grants and investments. Fund Advisors have online access to view fund statements and recommend grants. List additional changes in Section 7.

Please indicate if you would like to add or remove a Fund Advisor.

Add Remove (Terminate access to the Fund.)

Mr. Mrs. Ms. Dr. _____

First Name

Middle Initial

Last Name

Suffix

Preferred Name or Nickname

Date of Birth

Address Home Work

Phone Home Work Cell

City

State

Zip Code

Email Address



1055 Broadway Blvd., Suite 130 | Kansas City, MO 64105
866.627.3440 | www.greaterhorizons.org

4 Adding or Removing a Successor Advisor

Successor Advisors make grant and investment recommendations for the Fund after the Fund Advisors are no longer able or willing to do so. List additional changes in Section 7.

Please indicate if you would like to add or remove a Successor Advisor.

Add Remove (Terminate access to the Fund.)

Mr. Mrs. Ms. Dr. _____

First Name	Middle Initial	Last Name	Suffix
Preferred Name or Nickname		Date of Birth	
Address <input type="checkbox"/> Home <input type="checkbox"/> Work		Phone <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell	
City	State	Zip Code	Email Address
Relationship to Fund Advisor(s)			

5 Successor Advisor(s)

Please indicate how you would like your Successor Advisor(s) to act when making recommendations for the Fund. (Select One):

Independently By Majority By Unanimous Consent

6 Adding or Removing Professional Advisor(s)

Professional advisors include accountants, attorneys, and financial advisors with whom Greater Horizons may share information about your Fund should they inquire. List additional changes in Section 7.

Please indicate if you would like to add or remove a professional advisor who can receive information about your Fund.

Add Remove (Terminate access to the Fund.)

Professional Advisor Name & Profession	Firm Name
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If you wish to change how your Fund is invested, please complete and return the Investment Recommendation Form.

7

Additional Changes

Use the space below to add or remove additional Fund Advisors, Successor Advisors or Professional Advisors. Please include each individual's full name and contact information.

Large empty rectangular box for listing additional advisors.

8

Date and Signature(s)

Signature

Date

Printed Name

Signature

Date

Printed Name

Accepted by: _____ Date _____
(Greater Horizons)