



**ADDENDUM I**

**DONOR ADVISED FUND AGREEMENT**

[Date]

**Initial Transfer of Assets  
and Initial Investment**

**Initial Transfer of Assets**

The Donor transfers the following assets to the East Texas Communities Foundation to establish the \_\_\_\_\_  
\_\_\_\_\_ Fund:

**Initial Investment**

The Donor(s) recommend that the funds be initially invested in the (select one):

- \_\_\_\_\_ Cash Fund
- \_\_\_\_\_ Money Market Fund
- \_\_\_\_\_ Conservative Fund
- \_\_\_\_\_ Conservative Index Fund
- \_\_\_\_\_ Moderate Fund
- \_\_\_\_\_ Moderate Index Fund
- \_\_\_\_\_ Growth Fund
- \_\_\_\_\_ Growth Index Fund

If no recommendation is made, assets will be invested in the Moderate Fund.

Donor:

East Texas Communities Foundation:

\_\_\_\_\_  
Kyle L. Penney, President

**ADDENDUM II**

**\_\_\_\_\_ DONOR ADVISED FUND AGREEMENT**

[Date]

**Designation of Succession Plan**

**\_\_\_\_\_ Successor Donor Advisors**

The Donor hereby designates (and revokes any prior designation) \_\_\_\_\_ to serve as Successor Donor Advisor to the Fund after the resignation, incapacity, or death of the Donor, if s/he is living and willing to serve, and if not, the Donor appoints \_\_\_\_\_ to serve as Successor Donor Advisor to the Fund after the resignation, incapacity, or death of the Donor, if s/he is living and willing to serve. The Successor Donor Advisor shall have all the authority of the Donor Advisor, including the authority to recommend investment of the Fund, to recommend grants from the Fund and to name and change Successor Donor Advisors to the Fund.

**\_\_\_\_\_ Succession Plan**

The Donor hereby declares (and revokes any prior succession plan) that: (select one) \_\_\_\_\_ After the resignation, incapacity, or death of the Donor, or \_\_\_\_\_ In the event there is no properly designated Donor Advisor or Successor Donor Advisor to the Fund, any remaining balance shall \_\_\_\_\_

DONOR:

\_\_\_\_\_

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