

INFORMATION CHANGE RECOMMENDATION FORM



THE CHICAGO
COMMUNITY TRUST
EQUITY • OPPORTUNITY • PROSPERITY

Name of Donor(s) making recommendation(s)

UPDATE NAME OF FUND

Current Name of Fund

New Name of Fund

UPDATE CONTACT INFORMATION

Name	Email	Phone	
Address	City	State	Zip

UPDATE ADVISOR INFORMATION *(Select one from each category)*

Change:	Add	Remove		
Role:	Current Advisor	Investment Advisor	Additional Advisor	Successor Advisor
			Other	
Access	Current Grantmaking Authority	Future Grantmaking Authority	Current Visibility Only	

Name	Email	Phone	
Address	City	State	Zip

ADDITIONAL UPDATE *(Select one from each category)*

Change:	Add	Remove		
Role:	Current Advisor	Investment Advisor	Additional Advisor	Successor Advisor
			Other	
Access	Current Grantmaking Authority	Future Grantmaking Authority	Current Visibility Only	

Name	Email	Phone	
Address	City	State	Zip

UPDATE SUCCESSION PLAN

You may recommend that your fund continue after your death by naming one or more Successor Advisors to the fund. If you have named more than one successor advisor, please indicate how you would like the Successor Advisors to serve.

- Individually, with each having the ability to recommend grants independent of the other advisor(s)
- All serving concurrently and recommending grants by majority vote
- All serving concurrently and recommending grants by unanimous vote

UPDATE POST-DEATH CHARITABLE BENEFICIARIES *(use additional sheets as needed)*

You may recommend that your fund assets be granted to one or more charities, including The Chicago Community Trust, after the death of the last Advisor or Successor Advisor on the fund.

Name of Organization

Address	City	State	Zip
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Percentage of fund or specific dollar amount to be distributed: _____

Name of Organization

Address	City	State	Zip
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Percentage of fund or specific dollar amount to be distributed: _____

ENDOWMENT FUND

After your death, you have the option of converting your donor advised fund into a permanent endowment fund that can be set up to support one or more named charities with annual gifts, or it can be established to support an issue area or field of interest. For more information about this option, please contact your relationship manager or Tim Bresnahan, Senior Director of Gift Planning, at 312.616.8000 ext. 158.

UPDATE INVESTMENT RECOMMENDATION

- Growth Pool
- Money Market

Recommended Investment Advisor: _____
 (only available for accounts greater than \$1 million)

TERMS – ACKNOWLEDGEMENTS

It is understood that the donor to a fund may, from time to time, recommend changes to their fund, including, but not limited to, recommendations to change the name of the fund, to remove or replace an Advisor, to add Successor Advisors, to change the authority granted to a successor Advisor. Any such recommendation shall be made by the donors by an instrument in writing signed by the donors and delivered to The Chicago Community Foundation. It is further understood that any recommendations made by a donor regarding changes to a fund shall be advisory only, and The Chicago Community Foundation shall not be bound by such recommendations and shall be made in the sole discretion of The Chicago Community Foundation.

Signature of Donor	Date
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Signature of Donor	Date
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