

## GIVING FUND SUCCESSION PLAN

In the event of your death or incapacity, or the termination of your organization, you may wish to provide NCF with future instructions regarding the disposition of your Giving Fund. There are four ways to divide the remaining assets in the Fund, and you may select any one of these, or a combination of some or all. If needed, please attach an addendum for additional successor or charity details and your instructions.

- A. Name successor advisors** – Place some or all of the assets from your existing Fund into a new Fund(s) for others (such as your heirs) to distribute to charity. If you do not request a new Fund for a successor, NCF will accept advice from one or all of the successor advisors on your existing Fund.
- B. Support charities** – Recommend grants directly to your church or favorite ministries.
- C. Support NCF's Generosity Catalyst Fund** – Recommend a grant to the Generosity Catalyst Fund, which makes strategic investments in innovative projects and ministries designed to encourage generosity.
- D. Create a NCF Legacy Fund<sup>SM</sup>** – Establish an enhanced type of Giving Fund called a Legacy Fund when you have a Fund balance greater than \$1 million. This is a great option if you desire greater accountability of supported ministries or oversight for your successor advisors (Legacy Advisory Committee). *Contact NCF for more information.*

### 1. FUND HOLDER CONTACT INFORMATION

Title	First name	Initial	Last name
Address: Include P.O. Box, street, suite, or apt #			
City	State	Zip	Phone
Email	Fund name and number		

### 2. CREATE YOUR SUCCESSION PLAN

**Target plan amount (expected total of succession plan): \$ \_\_\_\_\_**

*If minor children are appointed as successor advisors, their advisory privileges will require the consent of their legally appointed guardian until the child reaches the age of 18. Please list the guardian separately as a successor.*

Successor A (Primary)  % or  \$

Title	First name	Initial	Last name
Address: Include P.O. Box, street, suite, or apt #			
City	State	Zip	Phone
Email	Relationship to you	Birthdate (Required)	

Should NCF transfer the requested amount to a new Giving Fund for this successor?  Yes  No

## 2. CREATE YOUR SUCCESSION PLAN (continued)

Successor B (Secondary)

% or  \$

\_\_\_\_\_  
Title First name Initial Last name

\_\_\_\_\_  
Address: Include P.O. Box, street, suite, or apt #

\_\_\_\_\_  
City State Zip Phone

\_\_\_\_\_  
Email Relationship to you Birthdate (Required)

Should NCF transfer the requested amount to a new Giving Fund for this successor?  Yes  No

### Support charities

**Ministry A**  % or  \$

**Ministry B**  % or  \$

\_\_\_\_\_  
Name EIN

\_\_\_\_\_  
Name EIN

\_\_\_\_\_  
Address: Include P.O. Box, street, suite, or apt #

\_\_\_\_\_  
Address: Include P.O. Box, street, suite, or apt #

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Phone Website

\_\_\_\_\_  
Phone Website

If you need to add additional names or organizations, please use a separate sheet of paper.

### Support NCF's Generosity Catalyst Fund

% or  \$

### Create an NCF Legacy Fund

% or  \$

TOTAL:  % or  \$

### Signatures

\_\_\_\_\_  
Primary Fund Holder Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Additional Fund Holder Signature (Required)

\_\_\_\_\_  
Date

NATIONAL CHRISTIAN CHARITABLE FOUNDATION, INC. D/B/A NATIONAL CHRISTIAN FOUNDATION

\_\_\_\_\_  
By

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name & Title

\_\_\_\_\_  
Effective Date