

Thank you for your interest in establishing a Donor Advised Fund with Bon Secours Mercy Health Foundation and for providing the information below.

When your form is complete, please review, sign, and send it via mail or email to:

Bon Secours Mercy Health Foundation
c/o Donor Advised Fund
2525 Cherry Street | Toledo | Ohio | 43608
DAF@bsmhealth.org

DONOR INFORMATION

Donor #1:

Mr./Mrs./Ms./Dr. _____

Name of business (if corporate fund) _____

Address _____

City/State/Zip _____

Phone _____

Email _____ Date of Birth (optional) _____

Donor #2:

Mr./Mrs./Ms./Dr. _____

Name of business (if corporate fund) _____

Address _____

City/State/Zip _____

Phone _____

Email _____ Date of Birth (optional) _____

FUND NAME

You may propose a name for this donor advised fund. Distributions from the fund are accompanied by a letter acknowledging the donor advised fund name (e.g., "The Smith Family Fund") and donor recommending the grant, unless you request anonymity.

Proposed Name of Fund: _____ Fund

ADVISORS TO THE FUND

Please list the initial advisor(s) to the fund (if different than donor(s)).

Mr./Mrs./Ms./Dr. _____

Name of business (if applicable) _____

Address _____

City/State/Zip _____

Phone _____

Email _____

SUCCESSOR ADVISORS TO THE FUND

If any, please name the successor advisors to this fund.

Successor advisors to serve (check one):

concurrently consecutively (if consecutively, list in order of succession)

1 Mr./Mrs./Ms./Dr. _____

Name of business (if applicable) _____

Address _____

City/State/Zip _____

Phone _____

Email _____

2 Mr./Mrs./Ms./Dr. _____
Name of business (if applicable) _____
Address _____
City/State/Zip _____
Phone _____
Email _____

INITIAL CONTRIBUTION

Please provide us with information regarding your initial contribution to create the donor advised fund.

Amount of Initial Contribution \$ _____

Form of Gift (cash, stock, other) _____

Estimated Date of Contribution _____

SIGNATURE

Please sign and date:

DONOR #1

Date

DONOR #2

Date

Thank you. We look forward to working with you.