

Thank you for your interest in establishing a Bon Secours Mercy Health Foundation Donor-Advised Fund 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 distribution, 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.