



Change of Designated Organizations Form

For Designated Funds with Multiple Beneficiaries

Gift Fund Name: _____ **Fund Number:** _____ **Date:** _____

Designated Funds are created to support one or more specified nonprofit organizations that the Donor names in the original fund agreement. To change information for a Gift Fund with multiple beneficiaries, please complete the below. Please indicate the percentage of the annual spendable amount to be distributed from the Gift Fund to each organization and ensure that the total percentage amount equals 100%. Should you have additional organizations, attach additional forms.

Check here if additional changes are indicated on a separate page

1. ADD ORGANIZATION: _____ **Remove Existing Beneficiary:** _____

PERCENTAGE OF DISTRIBUTION _____ STREET ADDRESS _____
CONTACT PERSON _____ CITY STATE ZIP _____
CONTACT EMAIL _____ BUSINESS PHONE _____

2. ADD ORGANIZATION: _____ **Remove Existing Beneficiary:** _____

PERCENTAGE OF DISTRIBUTION _____ STREET ADDRESS _____
CONTACT PERSON _____ CITY STATE ZIP _____
CONTACT EMAIL _____ BUSINESS PHONE _____

3. ADD ORGANIZATION: _____ **Remove Existing Beneficiary:** _____

PERCENTAGE OF DISTRIBUTION _____ STREET ADDRESS _____
CONTACT PERSON _____ CITY STATE ZIP _____
CONTACT EMAIL _____ BUSINESS PHONE _____

At least one Advisor must sign to authorize the change. I (we) understand, as set forth in the Charitable Giving Guide, that all Funds are subject to the policies of Foundation For The Carolinas and that the information set forth in this document is true and accurate to the best of my (our) knowledge.

Signature _____ Date _____

Signature _____ Date _____

Mail **original signed copy** to: Foundation For The Carolinas, 220 North Tryon Street, Charlotte, NC 28202