

# Donor Advisor Change Form

**RAYMOND JAMES Charitable**

**RJ Charitable  
Service Center**  
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Form #

FA #

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## Account Information

Account Title

Account Number

## New Advisor Designation

- A. Prior Donor Advisor Revocation: I/we amend the previous Advisor Designations, either Current or Successor, made me/us with respect to this Raymond James Charitable Endowment Fund Account named above and designate below the new Donor Advisor(s), new Successor Donor Advisor(s) or both.
- B. New Donor Advisor Designation: I, as the Donor, designate the person(s) listed below as the Donor and Successor Donor Advisor(s) of the Raymond James Charitable Endowment Fund Account named above. I understand that if I designate more than one Current and/or Successor Advisor, that each person may advise the board of directors of the Raymond James Charitable Endowment Fund independently, regardless of the advice give by other Donor Advisors. I further understand that in unusual circumstances, the board of directors reserves the right to modify designations in the best interest of the administration of the Raymond James Charitable Endowment Fund.
- B. Right To Revoke: I understand that I may revoke this designation of the advisors of the above referenced account at any time but only by completing and submitting to the Raymond James Charitable Endowment Fund a new Donor Advisor Change form, which shall supersede all my prior Donor Advisor Designations.

## Current Donor Advisors *(List all individuals to serve as current advisors on the account)*

The Donor Advisors names below will serve simultaneously and may each make recommendations independent of the other Donor Advisor(s).

Name

Relationship to Donor, if individual

Address

Date of birth

City

State

Zip

Social security or federal tax ID number

Daytime phone number

Name

Relationship to Donor, if individual

Address

Date of birth

City

State

Zip

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**Account Succession**

- Legacy of Giving Recommendation
- Successor Donor Advisors

If naming more than one advisor, please indicate by checking appropriate box below:

- The Donor Advisors named below will serve **one after another.**
- The Donor Advisors named below will serve **at the same time.**
- Maintaining a single account (each may make recommendations independent of other Donor Advisor(s)).
- Splitting the account into separate portions (please indicate in "Donor Advisor information" below the percentage of each share. Must total 100%).

Name	Relationship to Donor, if individual
Address	Date of birth
City	Social security or federal tax ID number
State	
Zip	
Daytime phone number	
If opting to split the account into separate portions, indicate percentage of share for Donor 1: _____ %	

Name	Relationship to Donor, if individual
Address	Date of birth
City	Social security or federal tax ID number
State	
Zip	
Daytime phone number	
If opting to split the account into separate portions, indicate percentage of share for Donor 2: _____ %	
If naming more than two Successors, attach additional pages. If so, percentage for Successor(s) attached: _____ %	
TOTAL = 100%	

**SIGNATURES**

Primary donor signature	Please print name	Date
Joint donor signature	Please print name	Date

Please contact [RJCHARITABLE@RAYMONDJAMES.COM](mailto:RJCHARITABLE@RAYMONDJAMES.COM) or 866-687-3863 or ext. 77221 with any questions.