

So You're a Successor Advisor, *Now What?*

As successor advisor to a donor advised fund at InFaith, you have been entrusted with a unique and important role. True to our mission, we will work together with you to spread joy and change lives through your charitable fund at InFaith.



WHAT IS A SUCCESSOR ADVISOR?

It's a term InFaith Community Foundation uses when the torch for a donor advised fund is passed from the original donor advisor(s) to you—and it means you are the advisor that comes after. It also means you have responsibility for what happens with the fund.

WHAT'S NEXT?

The original donor advisor(s) - whether it is a family member or friend, provided information on their giving goals through their Fund Agreement, and in some instances, completed forms or a personal letter to share their giving intentions.

We invite you to:

- Spend some time to reflect on the original donor(s)' gift and their Fund Agreement. The plans they've set in place came from their heart and express their wishes for the world.
- Ponder your own role in this work. Some successor advisors seek to manage the fund in careful alignment with the original donor desires, while others seek to clarify or modify the plan.
- Think about if you'd like to be the key decision maker or share this role with others. You can choose to manage the funds directly or involve others like your extended family in your creative planning.

We're here to support you in your role as a successor advisor. Contact us at 800.365.4172 or visit inFaithFound.org/GenerationsGive to learn more.



InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor's charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning the highest possible ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit inFaithFound.org.



Spreading Joy. Changing Lives.®

WE OFFER

- Donor advised funds, collaborative funds and organizational endowments.
- Full range of giving options, from simple to complex.
- Flexibility to give to any charity.
- Maximum tax benefits based on when and how charitable gifts are made.
- Donor-centered services including online access and family and women's giving resources.
- Mission-based investment options for charitable assets.