

**ESTABLISH A FUND
TO ORGANIZE YOUR CHARITABLE GIVING**

To get started, please complete the following information and return to Kern Community Foundation.

Contact Information

Fund Name: _____

Donor Name: _____

Organization Name (if applicable): _____

Address: _____

Phone: _____

Email: _____

Fund Type

Unrestricted Field of Interest Designated* Donor Advised Scholarship

Distributions from the fund should be made from:

Principal and income (non-endowed).

Income only (endowed).

An endowed fund is a permanent fund that will support a favorite charitable issue or organization forever.

Investment Option

Option 1: Choose to work with your own financial advisor:

Advisor Name: _____

Advisor Phone: _____

Advisor Email: _____

Option 2: Choose one of the following investment pools.

- Aggressive Equity, Intermediate Fixed Income, Short-Term Fixed Income, Money Market
- Moderately Aggressive Equity, Short-Term Fixed Income, Intermediate-Term Fixed Income, Money Market
- Moderate Mix Equity, Short-Term Fixed Income, Intermediate-Term Fixed Income, Money Market
- Conservative Mix Short-Term Fixed Income, Money Market, Intermediate-Term Fixed Income, Equity
- Risk Averse Mix Money Market
- Your Own Mix = 100% Total

Domestic Equity: _____ International Equity: _____ Intermediate-Term: _____ Short-Term: _____ Money Market: _____

Gift

- I will send a check payable to Kern Community Foundation to establish my fund.
- Please contact me with instructions on making a gift of stock, real estate, or other assets.
- Please contact me with instructions on making a planned gift from my estate.

*If you chose a designated fund, please specify which nonprofit organization(s) the fund will support: