

ACCOUNT INFORMATION

Account Name _____

Account Number _____

NEW ADVISOR DESIGNATION

- A. Prior Donor Advisor Revocation: I/we amend the previous Advisor Designations, either Current or Successor, made by me/us with respect to this Raymond James Charitable Endowment Fund Account named above and designates 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 given 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.
- C. 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 to the account.)

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

Primary Donor

Name _____

Relationship to Donor, if individual _____

Address _____

Date of birth _____

City, state and zip _____

Social security or federal tax ID number _____

Daytime phone number _____

Joint Donor

Name _____

Relationship to Donor, if individual _____

Address _____

Date of birth _____

City, state and zip _____

Social security or federal tax ID number _____

Daytime phone number _____

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 the other.
- 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%).

1. _____
 Name Relationship to Donor, if individual

 Address Date of birth

 City, state and zip Social security or federal tax ID number

 Daytime phone number
If opting to split the account into separate portions, indicate percentage of share for Donor Advisor 1: _____%

2. _____
 Name Relationship to Donor, if individual

 Address Date of birth

 City, state and zip Social security or federal tax ID number

 Daytime phone number
If opting to split the account into separate portions, indicate percentage of share for Donor Advisor 2: _____%

3. _____
 Name Relationship to Donor, if individual

 Address Date of birth

 City, state and zip Social security or federal tax ID number

 Daytime phone number
If opting to split the account into separate portions, indicate percentage of share for Donor Advisor 3: _____%

If naming more than 3 Successors, attach additional pages. If so, percentage for Successor(s) attached: _____%
 Total = 100%

SIGNATURES

 Primary Donor signature Date

 Please print name

 Joint Donor signature Date

 Please print name