



### New Fund Worksheet

**Fund Name:** \_\_\_\_\_

**Type of Fund:**      Agency              Designated              Donor Advised              Fiscal Sponsorship  
                                 Legacy              Other:

Choose One below:

- Endowed: Annual Spending Rate (currently 4.5%) available for grants (Min \$25,000 balance)
- Non endowed: 100% available for grants (see Fee Schedule for Fund Balance Minimums.)

How did you hear about the Wichita Falls Area Community Foundation?

\_\_\_\_\_

**Fund Advisors:**

**Authorized Individual #1**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Company/Nonprofit Org (if applicable): \_\_\_\_\_

EIN No. (if applicable): \_\_\_\_\_ Office Held: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Fund Statements Online?  Y or  N

**Authorized Individual #2**

Last Name \_\_\_\_\_ First Name: \_\_\_\_\_

Company/Nonprofit Org (if applicable): \_\_\_\_\_

EIN No. (if applicable): \_\_\_\_\_ Office Held: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Fund Statements Online?  Y or  N

**Fund Advisors will receive an email with login information to set up online access to the Fund through the Fund Advisor Portal. After initial setup, Fund Advisors can log in via wfacf.org. Email notifications will be sent when Quarterly Fund Statements are posted in the Portal unless the Fund Advisor requests statements to be mailed.**

**Organization Information (for Agency/Designated Funds):**

Organization Name: \_\_\_\_\_ EIN No: \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Website: \_\_\_\_\_

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Amount of the initial Gift to the Fund will be: \_\_\_\_\_

Check       Stock       Property       Other: \_\_\_\_\_

Charitable Intent of the Fund will be: \_\_\_\_\_

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**Successor Advisors:**

Husband and wife usually succeed one another as advisors. After they have both passed, one generation can be named as successor advisors. The fund can also become endowed upon the advisors passing and granted out according to the funds historical donations.

For organizations and nonprofits, successor advisor(s) will be the person(s) who hold the office(s) designated in the original fund agreement.

If no successor advisors are named, you can choose to create a legacy fund to continue making an impact after your passing. I/We would like more information on creating a legacy fund:    yes    no

Please list successor advisor(s) below:

Name: \_\_\_\_\_ Address: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

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Name: \_\_\_\_\_ Address: \_\_\_\_\_

Relationship: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

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Is WFACF and/or your fund in your planned giving? If so, please provide the information below. Would you like more information on planned giving?    yes    no

**Legacy/Planned Gift Information:**

Attorney Name: \_\_\_\_\_

Executor/trix Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Location of Will: \_\_\_\_\_

Return the worksheet to: Wichita Falls Area Community Foundation

2405 Kell Boulevard, Suite 100  
Wichita Falls, TX 76308

Scan and email to:

[wfacf@wfacf.org](mailto:wfacf@wfacf.org)

Fax: 940-766-2861