



ESTATE COMMITMENT FORM

When directing an estate gift to the Bradley Impact Fund, please complete this form and return it by email to donorservices@bradleyimpactfund.org or return it by mail to the address above. This will establish a new donor-advised account or prepare your current account to receive the gift. If you do not submit this form to the Bradley Impact Fund or make other arrangements to specify the use of the gift, the Fund will direct any estate received to the Partnership Fund.

SECTION A: ASSETS

Bequest To name the Bradley Impact Fund as a beneficiary in your will, please speak with your personal legal counsel to make the appropriate arrangements and draw up the legal documents. If desired, your attorney could personalize any of the following examples when structuring your will.

- 1) I give 25% of the residue of my estate to [Fund Name] of Bradley Impact Fund, EIN 45-4678325.
- 2) I give the sum of \$500,000 to [Fund Name] of Bradley Impact Fund, EIN 45-4678325.
- 3) I give 1,000 shares of X Corporation stock to [Fund Name] of Bradley Impact Fund, EIN 45-4678325.

Beneficiary Designation A beneficiary designation gift is a simple way to make a gift to support the Bradley Impact Fund. You can designate us as a beneficiary of a retirement, investment or bank account, or your life insurance policy. To make your gift, collect a new beneficiary designation form for each account. Complete the form, including **Bradley Impact Fund, EIN 45-4678325** as the beneficiary, sign the form and mail it back to your broker, banker or agent.

Other Commitment _____
 (Please describe asset.)

SECTION B: CONTACT INFORMATION

Account Holder(s)/Testator(s) _____

Preferred Salutation _____

Spouse's Name _____
 (if not Account Holder/Testator above)

Mailing Address _____

City, State, Zip _____

Phone _____

Email Address _____

SECTION C: FUND NAME / ANONYMITY

You have the privilege of choosing your fund name (e.g. Jane and John Doe Fund, Doe Family Fund, Freedom Fund, etc.) Unless you wish to remain anonymous, grants made from your fund are sent to the charity with a letter including your fund's name and your name and address.

Account Name _____

Identify all grants as anonymous. **OR** Identify all grants by my fund's name.

OR Use my existing Bradley Impact Fund Donor-Advised Account.

SECTION D: SETTING A TERM-LIMIT.

Choose one option from the items below as a means of winding down your account. The Bradley Impact Fund strongly encourages you to limit the life of your donor-advised fund to a term of twenty years or less.

- I would like the term of my donor-advised fund to end _____ years after my death.
- I would like the term of my donor-advised fund to end with the death of my last successor advisor.

SECTION E: STATING YOUR DONOR INTENT

When setting up a donor-advised fund through a bequest, we strongly encourage you to describe your charitable principles, interests, and goals so that the Bradley Impact Fund may better preserve your donor intent. You may also wish to document the names or types of public charities that you may either wish to fund or may not wish to fund. These examples can serve as guidelines to those who are charged with administering your account (either your successor-advisor or the Bradley Impact Fund). You alone have the authority to make written changes to your donor intent during your lifetime. Your intent must fall within (or not contradict) the purpose and mission to the Bradley Impact Fund.

Attach additional sheets as necessary.

SECTION F: SUCCESSOR ADVISORS

You may appoint trusted individuals as successor advisors to the fund established by the bequest. If you name more than one successor, please indicate how the remainder assets will be held. If **jointly**, note that successors have equal authority. If **separately**, indicate how the fund will be split. A minimum of \$10,000 is required to establish each split account. If you wish to appoint the Bradley Impact Fund as your advisor or have its board of directors distribute your assets directly to your choice of charities, see Section E. *If you do not choose a successor, your account will terminate according to your term limit and be disbursed to your beneficiaries.*

Successor Name _____
Mailing Address _____
City, State, Zip _____
Preferred Phone _____
Preferred Fax _____
Email Address _____
Relationship _____

Successor Name _____
Mailing Address _____
City, State, Zip _____
Preferred Phone _____
Preferred Fax _____
Email Address _____
Relationship _____

- Jointly Held Account** OR
- Split Account** \$ _____ or _____ %
- Jointly Held Account** OR
- Split Account** \$ _____ or _____ %

Attach additional sheets as necessary.

SECTION G: BENEFICIARIES

Upon your death, disbursements will continue from your account until the end of the defined term limit of your account (as stated in Section D above). Disbursements will follow your stated donor intent. The Bradley Impact Fund board of directors will allocate resources only to those charities that are in keeping with your principles and the Fund's purposes. *If you do not specify a beneficiary by the date of your fund's termination, the remainder of your donor-advised fund will go to the Partnership Fund when your account reaches its term limit.*

Bradley Impact Fund Programs and Events \$ _____ OR _____ % of account remainder.

Bradley Issue Funds (to be granted to organizations selected by the Impact Fund Board of Directors):

Partnership Fund \$ _____ OR _____ % of account remainder.

Constitutional Order Fund \$ _____ OR _____ % of account remainder.

Free Markets Fund \$ _____ OR _____ % of account remainder.

Civil Society Fund \$ _____ OR _____ % of account remainder.

Informed Citizens Fund \$ _____ OR _____ % of account remainder.

Public Charity _____

Contact Name _____

Mailing Address _____

City, State, Zip _____

Phone _____

Website _____

Federal Tax ID# _____

Grant Amount \$ _____

OR % of Account _____

Grant Purpose, if any _____

Public Charity _____

Contact Name _____

Mailing Address _____

City, State, Zip _____

Phone _____

Website _____

Federal Tax ID# _____

Grant Amount \$ _____

OR % of Account _____

Grant Purpose, if any _____

Attach additional sheets as necessary.

SECTION H: SIGNATURE

I have read the Bradley Impact Fund materials and understand the mission statement, grantmaking principles, and general rules and guidelines that apply to all Bradley Impact Fund grant disbursements. Additionally, I understand that if I do not designate successors or beneficiaries to this donor-advised fund, the remainder assets will be transferred to the Partnership Fund at the death of the last original account holder. I do hereby acknowledge and accept these conditions. I understand that any contribution, once accepted by the Bradley Impact Fund, represents an irrevocable charitable gift to the Bradley Impact Fund, and the Bradley Impact Fund has exclusive legal control over the assets contributed. I understand grants from the account may not benefit donors to the account, the account advisors or confer an impermissible private benefit, and can only be used for charitable purposes.

Testator Signature _____ **Date** _____

Testator Signature _____ **Date** _____