



SUCCESSOR ADVISORS

714 SOUTH THORNTON AVENUE
P.O. BOX 942
DALTON, GA 30720
706.275.9117

To appoint Successor Advisors, please complete and submit the form below.

Note: Donors or their successor or appointed advisors are permitted to name a Successor Advisor or Successor Co-advisors. Typically, donors name daughters, sons, or other relatives to serve in this capacity as a way of involving them in the family's philanthropy. This agreement will be continuous unless the named advisor is not involved or available.

Fund Name: _____

Present Advisor(s): _____

Successor Advisor(s):* _____

I/We, as the donor(s), request that the Successor Advisors named be given the opportunity to make grant suggestions to the Foundation:

- _____ Individually
- _____ With a majority

I/We, as the donor(s), request that the Successor Advisors named assume this responsibility:

- _____ on the following date _____
- _____ on the death of the present Advisor(s)
- _____ on a date to be determined by the present Advisor(s)

The Successor Advisors may request distributions from:

- _____ income only
- _____ income and principal
- _____ the amount determined by the Foundation's spending policy

Name of Donor(s): _____

Signature(s) of Donor(s): _____

Date submitted _____

* To add them to our mailing list, please provide addresses of successor advisors: