



SUCCESSOR ADVISOR FORM

The Community Foundation of Herkimer & Oneida Counties, Inc.
2608 Genesee Street, Utica, NY 13502 | P: 315-735-8212 | F: 315-735-9363
www.foundationhoc.org

Fund Name

As advisor for the donor-advised fund named above, you have the option of naming a successor or substitute advisor for this fund. You may appoint a successor advisor—from children, family members, or trusted friends, not to exceed one generation—to serve. This is not a requirement but a privilege that you may extend to someone who might enjoy serving in the advisor role on your behalf.

My successor advisor for the above-named Fund shall be:

Name: _____

Relationship: _____

This person shall replace me:

Now – effective _____

Later – upon my death, or when I cannot or do not wish to be advisor.

Signature: _____ Date: _____

Kindly provide the following information about your successor advisor:

- Address: _____
- Telephone: _____
- Email: _____

There shall be no other successor advisors. Upon the end of the advisement period, the Fund becomes an endowed, unrestricted fund with the same fund name, per the terms of the original fund agreement.