



190 Bethlehem Pike, Ste. One
 P.O. Box 605
 Colmar, PA 18915
 215.822.6601 - 800.822.6711
 F: 215.997.9545
www.trustcounselors.org

Successor Instructions

(09082011)

Name of Foundation

Account #

Name of Founder

Phone

Email

The following are additional instructions for my/our Foundation at Trust Counselors Network, Inc.

Successor Foundation Director

At the time of my death or disability, I would like to name the following individual as successor director of my foundation:

Name

Address, City, State, Zip

Phone

Fax

Email

Relationship

In the event that the successor cannot, for any reason, fulfill his/her responsibilities, I would like to name the following person as the alternative:

Name

Address, City, State, Zip

Phone

Fax

Email

Relationship

The successor that I have chosen may name their successor: Yes No

The successor that I have chosen may change the established charitable purpose of my foundation Yes No

I do not wish to name a successor. Please terminate my foundation at the time of my death or incapacity and distribute the funds to the following charitable organizations:

Charity Name Tax ID #

Contact Name Phone #

Address, City, State, Zip



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INVESTMENT ADVISOR

I / we would like to name the following person as my / our Investment Advisor (must be a registered Investment Advisor)

Name Company

Address, City, State, Zip

Phone Fax Email

Please replace this with any previously dated Successor Instruction forms in my foundation file.

Foundation Director Signature

Date