



Allocation of Remaining Assets

Donor-Advisors may name one or more charitable organizations for final distribution(s) in the event of your passing or incapacity. You may recommend multiple organizations by completing one form for each organization. Recommendations must be on file with the Significance Foundation prior to your passing or incapacity in order to be considered.

Date of Request: _____

Donor Name: _____

Foundation Name: _____

Donor Phone #: (_____) _____ Donor Email _____

Donor Address: _____

City, State Zip: _____

Name of Charity: _____

Contact Person at Charity: _____

Address of Charity: _____

Phone Number of Charity: _____

Percentage of Fund (note: please use only percentages as dollar values of the fund will fluctuate):
_____ %

Purpose of Distribution: (e.g., is the grant intended for a specific project, intended for the general operating expenses of the recipient organization, limited in some manner, or earmarked for a particular purpose?): _____

Please return this form by

Mail:
Significance Foundation
610 West Azele Street
Suite 203
Tampa, FL 33606

Fax:
(619) 232-8197

Email:
jplatt@significancefoundation.org