



# Louisiana Baptist Foundation Gift Management Agreement

**Donor(s):** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **City** \_\_\_\_\_ **State** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

Donor irrevocably donates, grants, conveys, transfers, and delivers to the Louisiana Baptist Foundation the assets as listed on the attached Schedule A.

Subject to the Louisiana Baptist Foundation’s Gift Planning Policy Statement, Investment Policy Statement, and Disclosure Statement, as amended, this gift is to be managed as:

- Endowment.** Charitable beneficiaries are listed on the attached Schedule C. Distributions are to be anonymous:     Yes     No
- Donor Advised Fund.** Donor(s) shall be the initial Advisor(s). Successor Advisor(s) are listed on the attached Schedule B. Residuary charitable beneficiaries are listed on the attached Schedule C. Upon the death of the last Advisor, any remaining balance shall be distributed to the named residuary charitable beneficiaries in the following manner:     Endowment     Lump Sum
- IRA Charitable Rollover Account.** Residuary charitable beneficiaries are listed on the attached Schedule C. Upon the death of the donor, any remaining balance shall be distributed to the named residuary charitable beneficiaries in the following manner:     Endowment     Lump Sum

**Name of Fund/Account:** \_\_\_\_\_  
*(If anonymous, please do not include your name in the name of the fund/account)*

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Louisiana Baptist Foundation accepts the gift from Donor(s) and agrees to faithfully administer such within the terms and condition set forth herein.

\_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Foundation Representative



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## Schedule “A” – Assets Donated

Type	Value
	\$
	\$
	\$

*Attach addendum if additional assets are donated.*

## Schedule “B” – Successor Advisor(s)

*(Only applicable for Donor Advised Funds)*

Order	Name	Address	Phone
1.			
2.			
3.			
4.			

*Attach addendum if additional Successor Advisors are needed. Alternative Successor Advisor(s) may be designated by a subsequent Letter of Instruction to the Foundation.*

## Schedule “C” – Charitable Beneficiaries

*(Beneficiaries must be either churches or other ministries)*

Name	Address	Percent
		%
		%
		%
		%

*Attach addendum if additional Charitable Beneficiaries are needed. Except for Endowments, alternative Charitable Beneficiaries may be designated by a subsequent Letter of Instruction to the Foundation.*

## Special Instructions

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

**ADVANCING THE KINGDOM:** One dollar at a time. One ministry at a time. One life at a time.

P.O. Box 311, Alexandria, LA 71309      1-877-523-4636      www.LBFinfo.org