COMMUNITY FOUNDATION OF WEST GEORGIA

Existing Fund Modification Form

Version March 12, 2024

Please use this form to edit, add, or discontinue a fund and/or fund advisors. Send the completed form to the Director of Operations, Julie Coppinger by email at julie@cfwg.net or mail to 807 S. Park St, Carrollton, GA 30117.

Name of Fund: ____

Change Request: Select one per form ☐ **Edit Fund and/or Advisors** ☐ **Discontinue Fund** ☐ **Edit Sub-fund** ☐ **Add Sub-fund** ☐ **Remove Sub-Fund**

Update Fund Features:

Action	Provide Informaion	Add	Edit	Remove
Name of Fund	[Enter name of fund]			
Allow Public to Donate (free)	[Enter information to be displayed about the fund to the public.]			[Make Private]
Include Image	Send image to cindy@cfwg.net			

Fund Advisor(s):

Add Fund Advisor or **Update** Existing Fund Advisor(s) Contact Information:

Name of Person	☐ **New** ☐ **Update** **1**	☐ **New** ☐ **Update** **2**
Place of Work and Title, optional		
Address City, State & Zip code	☐ Person ☐ Business	
Telephone	[indicate if person or business]	[indicate if person or business]
Email used for Login to Fund	☐ Person ☐ Business	☐ Person ☐ Business
Term: 1 year, permanent, etc		

Name of Fund: ____

Fund Advisor Continued:
Use this section to update a person(s) level of access to the fund. Enter the name(s). For each name: (1) Indicate if the access request is a change, addition, or removal and (2) mark each level of access based on the change, addition, or removal request. The "Create Grants" allows for disbursements from the fund. The "View Donations" contains confidential donor information.

Advisor Name	Change, Add, Remove	View Grants	Create Grants	View Don-ations	View Recei-pts	View Vou-chers	View Invoi-ces	View Files	View Stmt
1.									
2.									
3.									

Other Information
The updated policy for new individuals accessing funds is that all communication is by email which includes fund statements, donations, grants, and other information about the fund. Check here if you need an exception: ☐

Discontinue Fund or Sub-Fund:
To discontinue the fund, the fund balance needs to be reviewed and approved to ensure all activity has been completed: 1) all grants have been processed and cleared 2) pro-rate Quarterly Administrative Fees, if any, are completed, 3) Prorata share of last completed months investment activity, if any, is completed, and 4) Approval by President and/or Board of Directors. Check here that you understand the discontinuance of a fund. ☐

Authorization Required by President, Board Chairperson, or Board Treasurer

______________________________ or : ______________________________________ Date: ______________
President, Kim Jones ☐ Chairperson or ☐ Treasurer

Authorization

I understand that as an authorized fund advisor, that I am making the above changes to the fund. I realize this may include access to view the fund activity and issue disbursements (if "Create Grants" is checked). I realize that the fund activity is confidential and should not be disclosed except to authorized individuals. **Information extracted from the secure fund portal is solely the responsibility of the person given access to ensure the data custody of the information meets Federal and State laws when extracting data and viewing portal information.**

____ ________________ **Effective Date for Change:** __________
Authorized Signature (Primary Fund Advisor on Fund) Date

Print Name: ___________________________________

☐ **Check if attached Board Minutes to authorize change.**