

## PASSTHROUGH Fund Agreement

\_\_\_\_\_ (Date)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RE: FUNDNAME

Dear \_\_\_\_\_:

Thank you for agreeing to establish the FUNDNAME (herein referred as the "Fund") with the Burlington Community Fund, Ltd. This letter confirms the following:

The Fund will not be considered an endowment fund, nor will contributions to it be invested in the Burlington Community Fund's balanced portfolio. Instead, contributions will be invested in a money market fund and distributions may be made upon request. Any interest earned on this Passthrough Fund will remain with Burlington Community Fund (BCF) and, in addition, BCF will charge a 1% fee on each gift to the Fund.

You have the right to give BCF advice from time to time as to your suggestions for distributions from the Fund, consistent with the other terms of this letter. The final decision on all distributions rests with BCF, with careful and thoughtful consideration of any advice you may offer. If, for any reason, you should be unable to recommend distributions from your Fund, the Burlington Community Fund will assume the responsibility of making the distribution.

You may make additional contributions to your Fund at any time. You may also hold the balance, without making distributions, for a reasonable period of time.

If, at some future date, you wish to establish a permanent fund, BCF will be pleased to execute the standard agreement and any funds remaining in your Passthrough Fund will automatically become part of the endowment fund.

If this letter accurately reflects your understanding of the administration of your Passthrough Fund, you may indicate your concurrence by signing below. Please retain one completed copy for your files and return the other to BCF.

On behalf of the Board of Directors, please accept our thanks for giving to the community through the Burlington Community Fund. We hope you will enjoy your association with the BCF and look forward to assisting you in addressing your charitable interests.

Sincerely,

BURLINGTON COMMUNITY FUND, LTD.

By: \_\_\_\_\_

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

Accepted by:

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

Enclosure

FUNDNAME - Fund Details

**Fund Description - Please provide a brief description of the fund to be included in our publications (if desired):**

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**Gift to establish Fund (Check one):**

- " Stock Transfer
- " Check/Cash
- " Transfer from existing Fund
- " Other \_\_\_\_\_

**Anonymous Listing? (Check one):**

- " Yes
- " No

**Additional Notes for the fund file:** \_\_\_\_\_

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