



## FUTURE GIFT AGREEMENT

Community Foundation of Dunn County  
800 Wilson Avenue, Suite 235  
Menomonie, WI 54751

Re: Susan Thurin Resettlement Assistance Fund

Ladies and Gentlemen:

This **Future Gift Agreement** reflects my current wishes for sustaining a Fund with the Community Foundation of Dunn County, Inc., a Wisconsin not-for-profit corporation (the "Foundation" or "CFDC"). The principal of this Fund is expected to be received by the Foundation from my estate.

The Fund may also include such additional property received at any time by the Foundation from any source which has been designated to be part of the Fund and accepted by the Foundation for inclusion in the Fund. All future accruals, accumulations, interest, dividends and other capital growth of any nature, less all management fees, will be applied by the Foundation to the Fund in accordance with the accounting policies of the Foundation, consistently applied.

The Fund shall be a Designated Fund to benefit the following organizations equally:

This fund's mission is to provide grants to organizations that advocate for and provide relief to refugees, displaced persons, and stateless groups. This includes organizations that provide basic needs, including food, clothing, and shelter, and more complicated needs such as advocacy, resettlement assistance, legal assistance, and assimilation.

All distributions made from the Fund shall be in accordance with the spending policy of the Foundation as approved by the Board of Directors of the Foundation (the "Board") from time to time.

If, at any time in the future, it becomes unnecessary, impossible or inconsistent with charitable needs as determined by the Foundation's Board to make the payments as described above, the Board shall instead make payments to, alternatively, such other organization which is then qualified to receive such payments under the Internal Revenue Code of 1986, as amended (the "Code"), in such manner as most closely accomplishes the original purposes of the Fund.

The Foundation will provide all appropriate accounting and financial management services associated with the Fund and shall select, from time to time, the investment advisor(s) for the Fund.

The Fund will be an integral component of the Foundation. Accordingly, the assets of the fund and all additions thereto from whatever source shall be credited, net of all other management and other administration expenses, which shall be allocated among all of the Foundations funds as determined in accordance with the accounting policies of the Foundation, consistently applied. No separate portfolio of assets shall be held solely for the Fund but, rather, the Fund shall participate in the investment performance results of the Foundation, overall.

The Fund shall be a component part of the Foundation, and not a separate trust, and nothing in this Agreement shall affect the status of the Foundation as an organization described in Section 501(c)(3) of the Code, and as an organization which is not a private foundation within the meaning of Section 509(a) of the Code.

This Agreement shall be interpreted in a manner consistent with the foregoing intention and so as to conform to the requirements of the Code and the regulations issued pursuant thereto. The Foundation is authorized unilaterally to amend this Agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. References herein to provisions of the Code shall be deemed references to the corresponding provisions of any future Internal Revenue Code or regulations promulgated thereunder.

This Agreement is executed with the intent to be legally bound hereby.

Very truly yours,

Donor: \_\_\_\_\_  
Susan Thurin Signature

Accepted by Community Foundation of Dunn County, Inc. on \_\_\_\_\_

By: \_\_\_\_\_  
Bradley Waznik, Chair, Board of Directors

By: \_\_\_\_\_  
Georgina Tegart, Executive Director

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