

Evergreen Acorn Plan Advice Form

Plan name or number: _____

Advice Area A

I hereby advise Evergreen to invest Endowment Funds as follows:

Investment Options: *(Please pick one below)*

Money Market/CD

--OR--

Equity Based Investments

Advice Area B

I hereby instruct Evergreen to recognize the following party as the new Endowment Advisor

Effective: _____
(Please enter date or phrase such as "upon my death or legal incapacity".)

Name: _____

Address: _____

Phone: (____) _____

E-mail: _____

Advice Area C

I hereby instruct Evergreen to provide for the following Beneficiaries:

Tax Qualified Organization	Distribution Percentage
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

For Advice Areas A, B, and/or C above, I certify that I am the Endowment Advisor and therefore have legal standing to provide the above advice.

Endowment Advisor Signature

Print Name

Date