

**MOUNTAIN BROOK BAPTIST CHURCH/JAMES D. MOEBES FOUNDATION  
FUND ESTABLISHMENT FORM**

**Name:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Name of Fund:** \_\_\_\_\_

Estimated Amount of Initial Gift: \_\_\_\_\_

Current Gift \_\_\_\_ or Future Gift \_\_\_\_ (please check the appropriate space)

Type of Fund (please check the selected fund):

- Missions \_\_\_\_\_
- Facilities \_\_\_\_\_
- Compassion \_\_\_\_\_
- General \_\_\_\_\_

Purpose of the Fund (please include any directions or restrictions if there any):

---

---

---

---

Distribution Directions (please check the appropriate direction):

- \_\_\_\_\_ Distribute only accounting income.
- \_\_\_\_\_ Distribute \_\_\_\_\_ (number) percentage of corpus annually.
- \_\_\_\_\_ Distribute income and/or corpus at the discretion of the Board.
- \_\_\_\_\_ Distributions restricted as outlined above.

Donor agrees the fund will pay its pro rata share of the Mountain Brook Baptist Church/James D. Moebes Foundation's annual fees and expenses, and the donor understands the Board has complete discretion regarding the investments of the donor's fund. The donor also understands the Board reserves the discretion to terminate the fund if the Board believes the size of the fund has decreased to an amount which makes it no longer feasible to administer the fund as a separate fund.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
On behalf of the MBBC/JDM Foundation