

UPDATE AGENCY FUND FORM

Please use this form to change the name of your fund or to remove/add a new fund advisor

NAME OF AGENCY FUND

Name of Fund

Fund ID

1. CHANGE THE FUND NAME (if applicable)

New Fund Name

2. REMOVE CURRENT FUND ADVISOR

First Name

Middle Initial

Last Name

Suffix

Phone

Email Address

3. ADD A NEW FUND ADVISOR

Add Fund Advisor listed below

Mr. Mrs. Ms. Dr. Other: _____

First Name

Middle Initial

Last Name

Suffix

Title

Effective Date

Phone

Email Address

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Internal Use Only: Fund ID: _____



4. ADDITIONAL COMMENTS

Use the space below if you would like to document any additional information about the changes you have requested.

5. SIGNATURE

Insert electronic signature below or print this form, sign it, and return it to LBCF via email or U.S. Postal mail.

Printed Name Title

Signature Date

Accepted by: _____ Date _____
(Long Beach Community Foundation)