



## DONOR SUGGESTION FORM

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

I (we) suggest a distribution to the following eligible 501(c)(3) organization(s) in the amount(s) listed (\$100 minimum). Grant checks will be mailed directly to the charity with a letter describing the purpose of the grant and the Community Foundation's Board of Trustees has final authority over all distributions.

1. **Organization:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Tax ID: \_\_\_\_\_ Grant Amount: \$ \_\_\_\_\_

Unrestricted use OR Purpose: \_\_\_\_\_

2. **Organization:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Tax ID: \_\_\_\_\_ Grant Amount: \$ \_\_\_\_\_

Unrestricted use OR Purpose: \_\_\_\_\_

3. **Organization:** \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Tax ID: \_\_\_\_\_ Grant Amount: \$ \_\_\_\_\_

Unrestricted use OR Purpose: \_\_\_\_\_

I understand that these recommendations are in accordance with IRS regulations covering charitable contributions and **CANNOT** be used to:

- fulfill a legally binding pledge made by the donor, advisors or related parties to a nonprofit or educational institution; pay for raffle or event tickets, memberships, dinners or other activities that provide a benefit to the donor, advisors or related parties (**these must be paid for by the donor personally, not from the fund**); or support a political campaign or lobbying activities.

A multi-year (installment) grant can be made to an organization through a donor advised fund and can be made on a schedule recommended by you (e.g. annually, quarterly). Do not sign pledge agreements with charities; rather contact the Community Foundation first.

I have not received, nor do I or any related party, expect to receive any goods or services in exchange for this suggestion. I understand that under the Pension Protection Act of 2006, I could be assessed a penalty if I receive more than an "incidental" benefit as the result of a distribution from my donor advised fund.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone