

Community Foundation of the Gunnison Valley
Post Office Box 7057
Gunnison, Colorado 81230

Donor Advised Fund
Grant Recommendation Form

FUND NAME:

GRANT INFORMATION Grants to charities are accompanied by a letter recognizing the Advisor(s) recommending the grant from the Fund.

☐ Check here if you'd prefer the Advised Fund to issue your grant anonymously. If checked, the Community Foundation will not disclose the name of the Donor, Advisor, or Fund Name.

GRANT

Amount of Grant (\$100+ in \$50 increments):

RECIPIENT CHARITABLE ORGANIZATION Please review the Grant Recommendation Guidelines on the reverse side of this form. Please complete a separate form for each recommendation.

1. Organization's Official Name

Have you recommended a grant to this organization before via the Advised Fund? (If "Yes," then skip to box number 5 below)
___ Yes ___ No

2. Organization's Mailing Address

Street:

City:

State:

Zip:

3. Phone:

4. Federal Tax ID Number (if available):

5. Purpose (e.g., for operating expenses):

If the recommendation is for an amount less than \$25,000, it will be reviewed within a week, and, if approved, the Foundation will make the grant within two weeks. If the amount is for more than \$25,000, the timing is extended to two weeks for review, and, if approved, up to three weeks for disbursement.

SIGNATURE I acknowledge that I have read the Grant Recommendation Guidelines on the reverse side of this form and the Donor Advised Fund Guidelines. I hereby certify that the recommendations above do not represent payment of a pledge or other personal financial obligations on behalf of the fund representative(s), donors, advisors, family members or businesses they control. Neither I nor anyone related or connected with the fund will receive any benefit from the recommended charitable organization (e.g., I am not using this to pay membership fees, dues, tuition, benefit tickets, goods bought at auction, etc.) from this grant if distributed, and the grant does not fulfill a pre-existing pledge to the recommended charitable organization.

Signature:

Date:

Signature:

Date:

(Please be sure to initial page 2 as well)

OFFICE USE:

Approved by: _____ Date: _____



DONOR SERVICES If you have questions regarding this form or you require donor services, please call the Foundation at 970/641-8837 Monday through Friday between 8:00 a.m. and 5:00 p.m. mountain time.

Mail completed Forms to: Community Foundation of the Gunnison Valley
P.O. Box 7057
Gunnison, CO 81230

Email completed form to: alicia@cgv.org (If emailing this form, please *do not* mail the original.)

**COMMUNITY FOUNDATION OF THE GUNNISON VALLEY
DONOR ADVISED GRANT RECOMMENDATION GUIDELINES**

Charitable Organizations

- Grants from a Donor Advised Fund may be made to organizations qualified as tax-exempt under Internal Revenue Code Section 501(c)(3) of 1986 as amended. Each grant must be a minimum of \$100 and specified in \$50 increments. Grants may not be made to supporting organizations.

Grant Recommendation Limitations

- Grants from a Donor Advised Fund may not be used for any pre-existing pledge or to provide private benefit to donors, advisors, family members or the businesses they control. No tangible benefit, goods or services were or will be received by any individual or entities connected with the Fund (such as school tuition or scholarships sent directly to individuals or that benefit a family member, dues, membership fees, benefit tickets, dinners, event tickets, raffle tickets or goods bought at charitable auctions). Nor may grants be used for lobbying, political contributions, or to support political campaign activities. The Fund will not forward any enclosures other than a transmittal letter with the grant check. Under no circumstances may a grant provide a benefit to the donor recommending the distribution, a family member or any entity in which the donor or advisors have 35% of the voting power.

Grant Check Processes

- Grant checks must be made payable to the recipient organization's legal name, which may be different from the common use name and the Foundation will mail checks to the organization's official address. Grants will be disbursed directly to the recipient organization. Fund Advisors may not serve as intermediaries.
- If recommendation is accepted by Foundation, confirmation of the grant award will be mailed to the Advisor once the grant has been issued.

Advisor Initials _____