



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 grants **anonymously**. If checked, the Community Foundation will not disclose the name of the Donor, Advisor, or Fund Name.

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

RECIPIENT CHARITABLE ORGANIZATION

Please review the Grant Recommendation Guidelines on the reverse side of this form. If you have previously recommended grants to any of the organizations listed below, you do not need to fill out the address and phone number.

1. Organization 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. Mailing Address:
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

By signing below, I acknowledge that I have read the Grant Recommendation Guidelines on the reverse side of this form and the Donor Advised Fund Guidelines and that the above recommendation(s) do not represent the payment of any pledge or other financial obligation or otherwise violate established Guidelines.

Signature: _____ Date: _____

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 9:00 a.m. and 5:00 p.m. Mountain Time.

Mail completed form to: Community Foundation of the Gunnison Valley
PO Box 7057
Gunnison, CO 81230

OR

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

COMMUNITY FOUNDATION OF THE GUNNISON VALLEY DONOR ADVISED GRANT RECOMMENDATION GUIDELINES

(These Guidelines do not represent the entirety of the Donor Advised Fund Guidelines document; only the items related to grant recommendation and processing are included. To see the full Guidelines document, contact the Foundation.)

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 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. Any grants made from the Fund may not be bifurcated; that is, the charitable portion of a grant may not be separated from a non-charitable portion and granted from the Fund.

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 the recommendation is accepted by Foundation, confirmation of the grant award will be mailed to the advisor once the grant has been issued.

**** DID YOU KNOW? ****

Grant recommendations may now be made online!
Contact CFGV to learn more or enroll.