

DONOR ADVISED FUND GRANT RECOMMENDATION FORM

DONOR/ADVISOR INFORMATION

Name of the Fund

Designated DAF Advisor(s)

GRANT RECOMENDATION I

Name of Organization

Organization Representative

Address

City St Zip

E-mail

Phone Tax ID # (if known)

Grant Amount

Special Purpose (if any)

Anonymous?

Yes

No

GRANT RECOMENDATION II

Name of Organization

Organization Representative

Address

City St Zip

E-mail

Phone Tax ID # (if known)

Grant Amount

Special Purpose (if any)

Anonymous?

Yes

No

GRANT RECOMENDATION III

Name of Organization

Organization Representative

Address

City St Zip

E-mail

Phone Tax ID # (if known)

Grant Amount

Special Purpose (if any)

Anonymous?

Yes

No

GRANT RECOMENDATION IV

Name of Organization

Organization Representative

Address

City St Zip

E-mail

Phone Tax ID # (if known)

Grant Amount

Special Purpose (if any)

Anonymous?

Yes

No

Certification:

I certify that all of the grant recommendations above will not be for legally impermissible purposes based upon the following grant requirements:

- Grants cannot directly or indirectly provide more than an incidental benefit to the donor, donor-advisor, a member of the donor or donor-advisor's family, or a 35% controlled entity of the aforementioned, unless the Code or the Regulations provide to the contrary.
- Proposed grants cannot fulfill pledges or promises already made by the donor-advisor or others. For example, if a donor-advisor made a pledge in his or her own name to support an organization, the Alliance Community Foundation Donor Advised Fund cannot fulfill that pledge on his or her behalf. The donor-advisor may, however, recommend that the Alliance Community Foundation Donor Advised Fund make ongoing multi-year grants from the donor advised account to support a charitable organization.
- IRS Regulations forbid grants that would benefit the donor-advisor or any specific individual. This includes requests to pay for memberships or tickets to galleries, museums or public broadcasting stations, goods at a charitable auction, school tuition, or benefit dinners. These Regulations ensure that the dollars contributed to the Alliance Community Foundation Donor Advised Fund will go directly and fully to support charitable programs.
- Grants cannot be made for lobbying purposes or to support political campaigns.

Signature of Designated DAF Advisor(s):

Date

Mail, or E-mail this form to:

Alliance Community Foundation
Planned Giving Office
450 Sapphire Way SW
Vero Beach, FL 32968
(772) 365-1030

E-mail: drice@alliancecommunityfoundation.org