



Donor Advised Grant Recommendation Form

Fund Name: _____

As the fund advisor to the Community Foundation of Boone County for the above listed Fund, the grant(s) listed below.

Please send a grant check in the amount of \$_____ to the following charitable organization:

Organization _____

Contact name _____

Address _____

Phone _____

For the purpose of _____

I acknowledge and represent as follows:

- That the grant recommendation or recommendations must receive approval by the Community Foundation of Boone County Board of Directors. I also understand that this is a recommendation only, and not a direction.
- I further certify that the grants listed above will not provide any benefit to the fund advisor, donor, or committee member.
- That, in accordance with IRS regulations, this recommendation will not be made to pay dues for membership of an individual in an organization, to discharge or satisfy a legally enforceable obligation or personal pledge or for any purpose from which the donors, advisors, or related parties to the above-listed fund will receive some benefit.
- Donor Advised Funds (DAF) may not make any grants to individuals, such as scholarships, emergency hardship grants or disaster relief grants. This includes payments directly to an individual or to an entity for the benefit of a specified individual (i.e., to a university for a scholarship for a particular student). If donors wish to grant scholarships, a different type of fund can be established.
- Donors, advisors or any related parties may not receive grants, loans, compensation or similar payments (including expense reimbursements) from a DAF.

Donor Signature: _____ Date: _____

Return form to:

Community Foundation of Boone County | 102 N. Lebanon Street, Suite 200 | Lebanon, IN 46052
Or email to Barb Schroeder at barb@communityfoundationbc.org