

Donor-Advised Fund Grant Recommendation Form



Name of Fund: _____

Date: _____

I recommend:

- That the following grants be awarded from my fund, as listed in the **shaded section below** on left.
- That OBCF award grants from my fund this year through the Community Enrichment Grants Program in the amount of \$_____. I understand that grants will be awarded on a competitive basis to nonprofits addressing the Outer Banks's most urgent needs and promising opportunities.
- That OBCF award grants from my fund this year through the Community Enrichment Grants Program in the amount of \$_____ within the following area of interest: _____ (e.g., education, health).
- That NO grants be awarded from my fund this year.

complete this section if FIRST option selected above

Organization Name: _____

Mailing Address: _____
(incl. city, st., zip) _____

Grant Amount: \$ _____ **Grant Purpose:** _____
(min. \$100) (if none listed, grant will be unrestricted)

Anonymous? ___ Yes ___ No

Organization Name: _____

Mailing Address: _____
(incl. city, st., zip) _____

Grant Amount: \$ _____ **Grant Purpose:** _____
(min. \$100) (if none listed, grant will be unrestricted)

Anonymous? ___ Yes ___ No

Organization Name: _____

Mailing Address: _____
(incl. city, st., zip) _____

Grant Amount: \$ _____ **Grant Purpose:** _____
(min. \$100) (if none listed, grant will be unrestricted)

Anonymous? ___ Yes ___ No

You may recommend a grant to any 501c3 organization on the Outer Banks or elsewhere, as well as to certain other tax-exempt entities for charitable projects. (Please call us if you have questions about eligibility.)

As a public charity, the Community Foundation cannot be bound legally by your recommendations.

Before approving any grants, Community Foundation staff will conduct the required due diligence to ensure that all legal and financial guidelines are met.

Our board of directors will then review your recommendations at their next meeting. Their meetings are regularly scheduled for the first Thursdays of March, June, September, and December, as well as the last business day of each calendar year.

Grants from a donor-advised fund cannot result in the donor, advisors, or any related parties receiving benefits from the grant recipient. Donor-advised grants cannot be used to satisfy any portion of a financial obligation of the donor, advisor, or related parties. Donors, advisors, or related parties may not receive grants, loans, compensation, or similar payments from donor-advised funds.

Signature of Advisor

Printed Name