



### DONOR - ADVISED GRANT RECOMMENDATION FORM

Pursuant to the established terms of the \_\_\_\_\_, a donor-advised fund of Community Foundation Sonoma County, I/we hereby recommend a grant to the following nonprofit organization:

Grant Amount: \_\_\_\_\_

Name of Nonprofit: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Website: \_\_\_\_\_

This grant is for the following charitable purpose: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you want your fund name mentioned in the letter to the grantee?  yes  no

*Under IRS regulations, payments of personal pledges made by donors to charitable organizations may not be made from donor-advised funds. Such payments are considered by the IRS to be a donor-initiated material restriction on the use of a donor-advised fund, which violates the requirement that the Community Foundation have full control of the fund. A community foundation risks losing its status as a 501(c)(3) charity should it disregard this regulation.*

*By signing this form, you agree that the recommended grant will not be used for any of the following proposes:*

- *To fulfill a pledge made to a nonprofit organization or institution*
- *To support a political campaign*
- *To pay for a membership, dinner, performance or other activity that provides a benefit to the donor*

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor Signature

\_\_\_\_\_  
Date

<i>For office use only:</i>	
Date received: _____	Due diligence completed: _____
Fund number: _____	CEO approval: _____