Grant Recommendation

Complete this form to recommend a grant (minimum $200) from your Donor Advised Fund to support a public charity. This form can also be accessed at www.rochesterarea.org/giving/fundholder-resources. If you need assistance, call (507) 282-0203 or send an email to giving@rochesterarea.org.

1. **Fund Information**

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Primary Advisor</th>
</tr>
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<tbody>
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   Email

2. **Grant Details**

<table>
<thead>
<tr>
<th>Charity Name</th>
<th>Distribution Amount ($200 minimum)</th>
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</thead>
<tbody>
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   Street Address | City/State | Zip

   Purpose: □ Unrestricted (default) □ General Operating Expenses □ Special Project □ Capital Expenditure □ Other (e.g. “in memory/honor of”) ____________________________

   *To recommend multiple grants, please list the above information for each grant on a separate sheet with a dated signature.*

   To recommend a grant to **RAF’s Better Communities Fund** please indicate the amount here: $____________________

3. **Recognition**

   A letter accompanying your grant(s) will be sent to your selected charity. Please indicate your preference for Recognition.

   □ Recognize Fund Name (default if none checked) □ Anonymous

4. **Acknowledgement of Terms**

   I understand that this is a recommendation and not a direction. I further understand that Rochester Area Foundation (RAF) reviews all grants to ensure that the organization is a qualified charity under IRS regulations, and that the purpose of the grant is charitable in nature. RAF may deny a recommendation if the grant does not meet criteria for approval.

   **By signing below, I acknowledge that this grant is NOT intended to:**

   • Fulfill an existing pledge. (An existing pledge is one made before this grant has been approved by RAF.)
   • Acquire more than an incidental benefit, good or service for any specific individual or myself.
   • Pay for event sponsorship, event tables, items from charitable auction, or other goods or services.
   • Support a political campaign or lobbying activity.
   • Support an individual (scholarships, tuition, awards).
   • Support a private non-operating foundation.

   ____________________________  ____________________________
   Primary/Joint Advisor Signature  Date

5. **Return this completed form by mail, fax, or email to:**

   Rochester Area Foundation | 12 Elton Hills Dr NW Rochester, MN 55901 | Fax: (507) 616-7608 | Email: giving@rochesterarea.org

   *When your grant is sent to the recipient organization, you will be notified via email.*