



**Donor-Advised Fund  
Grant Request Form**

**After completing all sections, please mail, scan or fax to:**

Community Foundation of North Texas  
306 West Seventh Street, Suite 850  
Fort Worth, TX 76102

Email: Paula Hall at [phall@cfntx.org](mailto:phall@cfntx.org)  
Fax to: 817.877.1215

Date: \_\_\_\_\_

Name of Donor-Advised Fund: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**INFORMATION FOR PROPOSED GRANT**

Nonprofit Organization Name: \_\_\_\_\_

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

Contact Name and Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Proposed Grant Amount: \_\_\_\_\_ **Is this grant anonymous?**  YES or  NO

Purpose of Grant: \_\_\_\_\_

Please Check box, if grant is a  memorial or  honorarium:

Name of person being recognized: \_\_\_\_\_

Name and Address to send acknowledgment: \_\_\_\_\_

\_\_\_\_\_

I attest that the recommendation above does not represent payment of a pledge or other personal financial obligations on behalf of the fund representative(s), family members or businesses they control and that **no** tangible benefit, goods or services, such as membership, dinners, tickets, golf tournament, etc. were or will be received by any individual or entities connected with the Fund described above.

I also understand no grants, loans, compensation or similar payments can be made to donors, advisors or related parties.

I understand that this is a recommendation only and that the Foundation's Board of Directors has sole discretion for grants made from the Fund.

Printed Name of Donor/Advisor: \_\_\_\_\_

Signature of Donor/Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

*Per Federal legislation enacted in 2000, known as the Electronic Signatures in Global and International Commerce Act (ESGICA), please be aware that an electronic signature (which can be just your typed name) is as legally binding as a handwritten signature. However, if used, the Foundation will require a phone call for confirmation before processing.*



## RECOMMENDATION FOR CHARITABLE DISTRIBUTIONS

306 West Seventh Street  
Suite 850  
Fort Worth, Texas 76102  
Phone: 817-877-0702  
Fax: 817-877-1215  
E-Mail: [phall@cfntx.org](mailto:phall@cfntx.org)

### The Community Foundation of North Texas *Frequently Asked Questions about Donor Advised Funds*

#### **How quickly are grants processed?**

Grant checks are generally processed weekly. If your recommended grantee is included on CFNTx's previously approved list, the check will be mailed on the first applicable date after we receive the recommendation(s). If the potential grantee is unfamiliar to the Foundation, Trustee approval is required before processing.

#### **Is there a minimum grant amount?**

Yes, we suggest a \$100 minimum except in the case of memorials.

#### **May I recommend grants to agencies located outside of the United States?**

Yes, if they are chartered in the United States.

#### **What kind of grants cannot be made from a donor advised fund at the Community Foundation?**

Agencies based outside of the United States, private foundations, and agencies not certified 501(c)(3) by the IRS may not receive grants from donor advised funds. In addition, grants cannot be made to individuals, nor can we allow grants that include tangible benefits to individual donors.

#### **Can a donor advised fund be used to pay a pledge?**

No. When you make a contribution to a donor advised fund at the Community Foundation, you are entitled to take the full amount as a tax deduction. This is because you have received nothing in return for your contribution. If the Community Foundation satisfies your pledge, you will be receiving something in return for your contribution – release of a debt. Therefore, grants from a donor advised fund may not be used to satisfy a personal pledge made to a charity. However, contact us and the Community Foundation may choose to make a pledge on a donor's behalf.

#### **Can I recommend grants anonymously?**

Yes. The agency will be notified that the grant was recommended by an anonymous donor and will be advised to acknowledge receipt to the Community Foundation.

#### **I received a tax acknowledgment for a grant I recommended from the agency. Does that mean I can take the deduction on my income taxes?**

No. Your income tax deduction was earned when you made your contribution(s) to your donor advised fund. The acknowledgment of your gift to the Community Foundation is your receipt to document your gift on your tax return. Thank you notes from agencies are sent to let you know that a gift was received and appreciated.

#### **Is there a process whereby I can recommend grants to be paid at specific intervals, such as quarterly?**

Yes. We make sure that recommended agencies qualify as an IRS section 501(c)(3) organization and that the purpose of the grant is consistent with the Foundation's charitable purposes.

#### **Can I phone or e-mail grant recommendations?**

Yes. If you choose to make a verbal grant recommendation, a confirmation will be faxed or mailed to you. The grant will not be processed until the confirmation is received back in our office. We also accept grant recommendations by fax.

#### **Donor Central is a service for donor advisors.**

You can view fund balances, contributions, grants made and grants pending – with information updated monthly. Donors can recommend grants on Donor Central. If you wish to use Donor Central on our website, [www.cfntx.org](http://www.cfntx.org), please call or e-mail Vicki Andrews at the Foundation office, 817.877.0702, or e-mail her at [vandrews@cfntx.org](mailto:vandrews@cfntx.org).

#### **Who do I call if I have questions about a grant or about my fund?**

For questions related to your grant, please contact **Paula Hall**, Grants Administrator, 817.877.0702, fax 817.877.1215, or e-mail a message to [phall@cfntx.org](mailto:phall@cfntx.org). For questions related to your fund, please contact **Vicki Andrews**, Director of Operations, 817.877.0702, fax 817.877.1215, or e-mail [vandrews@cfntx.org](mailto:vandrews@cfntx.org).