



Rochester Area  
Foundation

# 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/give/fundholder-resources.php](http://www.rochesterarea.org/give/fundholder-resources.php). If you need assistance, call (507) 282-0203 or send an email to [giving@rochesterarea.org](mailto:giving@rochesterarea.org).

## 1. Fund Information

\_\_\_\_\_

Fund Name

\_\_\_\_\_

Primary Advisor

\_\_\_\_\_

Email

## 2. Grant Details

\_\_\_\_\_

Charity Name

\_\_\_\_\_

Distribution Amount (\$200 minimum)

\_\_\_\_\_

Street Address

\_\_\_\_\_

City/State

\_\_\_\_\_

Zip

Purpose:

- Unrestricted (default)  General Operating Expenses  Special Project \_\_\_\_\_
- Capital Expenditure  Other (e.g. "in memory/honor of") \_\_\_\_\_

*If you would like to recommend multiple grants, please list the above information for each grant on a separate sheet with a dated signature.*

## 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) 282-4938 | Email: [giving@rochesterarea.org](mailto:giving@rochesterarea.org)

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