

Grant Recommendation Form

Name of Donor Advised Fund

As the Advisor to the above-referenced fund, I recommend that the following grant be made from the fund (one grant per request form):

Charitable Organization Information

Organization: _____

Contact: _____

Address: _____

Phone/Email: _____

Recommended Grant Amount

Grant Amount \$ _____

Donor Acknowledgement

- In the name of the Donor Advised Fund (this option will be used if no other selection is made)
- Anonymously

Purpose of Grant

- Unrestricted
- Specific Program or Project/Other: _____

Signature of Fund Advisor

I understand that this recommendation is advisory only and that the final authority over all distributions rests with Lakeshore Community Foundation, Inc., whose responsibility it is to ensure that all grants are made for charitable purposes consistent with Internal Revenue Service guidelines and Lakeshore Community Foundation, Inc.'s purpose, as well as the tax laws applicable to donor-advised funds. I attest that the recommendation above does not represent payment of a pledge or other personal financial obligation on behalf of the donors, advisors, family members, or related parties and businesses they control, and that no more than incidental benefits, goods, or services were or will be received by any individual or entity associated with the fund.

Signature of Fund Advisor

Date

Print Name



Please return this form to: Lakeshore Community Foundation, Inc.
915 Memorial Drive
Manitowoc, WI 54220
rwieger@LakeshoreCommunityFoundation.org

LAKESHORE COMMUNITY
Foundation

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