

**Donor Advised Fund
Grant Recommendation Form**

Mail, fax, or email completed form to:
York County Community Foundation
14 West Market Street, York, PA 17401
PHONE 717.848.3733 FAX 717.854.7231 Email: lboyce@yccf.org

Name of Fund: _____ **Date:** _____

As Advisor to the above Fund, I recommend that the Board of Directors of York County Community Foundation consider the following grants. *I acknowledge that the following recommendations are to qualified 501(c)(3) organizations (publicly supported and not a private foundation). I understand that final judgment on these recommendations is the decision of the Board of Directors of York County Community Foundation. I certify that these recommendations do not represent the payment of any legally enforceable pledge or obligation and that I will not receive or accept any goods, services (memberships, tickets to events, benefits of a personal or corporate nature, etc.) or non-tax deductible membership benefits in connection with any such payment made by York County Community Foundation.*

Advisor Name: _____ **Advisor Name:** _____

Email: _____ **Email:** _____

Signature: _____ **Signature:** _____

Grant Amount

Organization Name: _____
Address: _____
City, State, Zip: _____
Phone number: _____
Contact person: _____ **Title:** _____

If grant is for a purpose other than general operating support, please specify purpose:

Grant Amount \$ _____ Make gift anonymously

**I'd like to support
a vibrant York
County!**

**I'd like to advise a
grant to:**

Organization Name: _____
Address: _____
City, State, Zip: _____
Phone number: _____
Contact person: _____ **Title:** _____

If grant is for a purpose other than general operating support, please specify purpose:

Grant Amount \$ _____ Make gift anonymously

\$	Fund for York County
\$	Education
\$	Community Development
\$	Arts & Culture
\$	Children & Youth
\$	Environment
\$	Aging
\$	Health & Human Needs
\$	Agriculture & Land Preservation

Organization Name: _____
Address: _____
City, State, Zip: _____
Phone number: _____
Contact person: _____ **Title:** _____

If grant is for a purpose other than general operating support, please specify purpose:

Frequently Asked Questions About Donor Advised Funds

How quickly are grants processed?

Grant checks are processed twice a month. Proper due diligence must be performed to ensure that the recommended grantee is 501(c)(3) certified by the IRS. The grant will be processed on the next available processing date after the due diligence has been completed.

Is there a minimum grant amount?

Yes, we require a \$250 minimum per grant.

What kind of grants cannot be made from a donor advised fund of 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.

Grants cannot be made to individuals nor can we allow grants that include tangible benefits to individuals, particularly the donor or their family members.

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

No. York County Community Foundation policies and Internal Revenue Service requirements prohibit the Foundation from issuing grants to satisfy pledge commitments. 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. If you intend to use your donor advised fund to support a nonprofit organization, we suggest the following language in response to a request for a pledge: *I will be pleased to recommend a grant of \$(amount) from York County Community Foundation (name of fund) to*

(name of organization) for (purpose of grant). This grant recommendation is subject to the approval of York County Community Foundation's Board of Directors.

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.

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.

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

Yes, if they are chartered in the United States and certified 501(c)(3) by the IRS.

Can I phone or e-mail grant recommendations?

Yes. If you choose to make a verbal grant recommendation, a confirmation will be emailed to you. The grant will not be processed until the confirmation is received back in our office. We also accept grant recommendations by fax at 717.854.7231 and email at lboyce@yccf.org.

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

Please call Layla Boyce at 717.848.3733 or email lboyce@yccf.org.

A notification letter and a grant check will be sent to the grantee following approval of your recommendation. You will be notified after the distributions are made. Should the Community Foundation have any questions about your recommendations, you will be contacted by a member of the Community Foundation staff.