



# DONOR-ADVISED GRANT RECOMMENDATION FORM

The Community Foundation of Herkimer & Oneida Counties, Inc.

2608 Genesee Street . Utica, NY 13502 P: 315-735-8212 F: 315-735-9363

[www.foundationhoc.org](http://www.foundationhoc.org)

FUND NAME: \_\_\_\_\_

A reminder: special IRS rules and federal regulations apply to grants from Donor-Advised Funds as fully described in the Donor-Advised Guidelines. Briefly, grants must be made to charitable organizations as described under IRS Code 501(c)(3) & 509(a)(1) & (2) and may not: benefit an individual, satisfy a personal pledge, be made to a foreign charity, or be used for political purposes or campaigns.

I recommend the following grants (minimum \$200) from the above-named fund:

Organization Name: _____
Organization Address: _____
Contact Name: _____ Phone: _____
Amount: _____ Purpose: _____

Organization Name: _____
Organization Address: _____
Contact Name: _____ Phone: _____
Amount: _____ Purpose: _____

Organization Name: _____
Organization Address: _____
Contact Name: _____ Phone: _____
Amount: _____ Purpose: _____

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

If you would like assistance in determining the effectiveness of a particular charity or program, please contact Director of Donor and Community Engagement Lindsey Costello at [lcostello@foundationhoc.org](mailto:lcostello@foundationhoc.org) or by calling (315) 731-3726.