



# Grant Recommendation Form

## For distributions from Donor Advised Funds

To recommend a distribution from your Donor Advised Fund, please complete this form and then either email it to [sally@spurfoundation.org](mailto:sally@spurfoundation.org), or mail it to Spur Community Foundation, PO Box 6184, Ketchum ID 83340.

Recommendations that meet Spur's due diligence requirements are generally mailed to the recipient within 7 business days.

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

### Grant Acknowledgment: (optional)

Grantee may acknowledge this contributions as  Anonymous  Fund name  Personal Name(s)  
 Other \_\_\_\_\_

Please ask Grantee to send acknowledgments to  Address on File  Address below  Spur

Name(s) \_\_\_\_\_

Mailing address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

### Grant #1: (for Wood River Valley organizations, only items marked with and \* are required)

ORGANIZATION NAME:\* \_\_\_\_\_ Fed Tax ID \_\_\_\_\_

Mailing address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

AMOUNT:\* \_\_\_\_\_  Follow-up Requested (available for grants of \$5,000 or more)  
(Min. \$500)

TIMING OF GRANT:\*  as soon as possible  send on date \_\_\_\_/\_\_\_\_/\_\_\_\_  
Repeat  Annually  Semi-annually  Quarterly  Monthly

PURPOSE: \*(if other than for general support): \_\_\_\_\_

Internal Use Only:

Amount Available  Recipient Eligibility Checked  Approved \_\_\_\_/\_\_\_\_/\_\_\_\_ GRANT ID: \_\_\_\_\_

By signing below, I acknowledge the recommendation above does not represent the payment of any legal binding personal pledge or other financial obligation, nor does the undersigned expect any personal benefit from this charitable distribution. I also understand that Spur's policy requires grant checks and award letters to be mailed directly to the grantee. (See back of form for complete grant recommendation guidelines)

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

Print Name: \_\_\_\_\_ Email: \_\_\_\_\_

## Spur Grant Recommendation Form for distributions from Donor Advised Funds

### Grant #2: (for Wood River Valley organizations, only items marked with and \* are required)

ORGANIZATION NAME:\* \_\_\_\_\_ Fed Tax ID \_\_\_\_\_

Mailing address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

AMOUNT:\* \_\_\_\_\_  Follow-up Requested (available for grants of \$5,000 or more)  
(Min. \$500)

TIMING OF GRANT:\*  as soon as possible  send on date \_\_\_\_/\_\_\_\_/\_\_\_\_

Repeat  Annually  Semi-annually  Quarterly  Monthly

PURPOSE: \*(if other than for general support): \_\_\_\_\_

Internal Use Only:

Amount Available  Recipient Eligibility Checked  Approved \_\_\_\_/\_\_\_\_/\_\_\_\_ GRANT ID: \_\_\_\_\_

### Grant #3: (for Wood River Valley organizations, only items marked with and \* are required)

ORGANIZATION NAME:\* \_\_\_\_\_ Fed Tax ID \_\_\_\_\_

Mailing address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

AMOUNT:\* \_\_\_\_\_  Follow-up Requested (available for grants of \$5,000 or more)  
(Min. \$500)

TIMING OF GRANT:\*  as soon as possible  send on date \_\_\_\_/\_\_\_\_/\_\_\_\_

Repeat  Annually  Semi-annually  Quarterly  Monthly

PURPOSE: \*(if other than for general support): \_\_\_\_\_

Internal Use Only:

Amount Available  Recipient Eligibility Checked  Approved \_\_\_\_/\_\_\_\_/\_\_\_\_ GRANT ID: \_\_\_\_\_

### Spur Grant Recommendation Guidelines

Thank you for submitting your Grant Recommendation. Please be advised that in order to maintain its own tax-exempt status, Spur Community Foundation must review, approve or decline grant recommendations. Listed below are a few guidelines to help you with your grant recommendation.

- Spur can only grant to qualified public charitable organizations (i.e. 501(c)(3), operating foundations, or governmental and educational institutions).
- Per IRS guidelines for Donor Advised Funds, Spur is not permitted to distribute grants to individuals, supporting organizations, or private non-operating foundations.
- Grant checks and award letters are made to the legal name of the grantee and mailed directly to its address.
- Grants must be used entirely for charitable purposes.
- Any grant that provides more than an incidental benefit to donors or fund advisors and/or their families is not permitted. Under the Pension Protection Act of 2006, monetary penalties may apply to you personally if you receive a prohibited benefit or you recommended a grant which results in a prohibited benefit.
- To request a follow-up report for grants under \$5,000 please contact your Sally Gillespie—Sally@SpurFoundation.org.
- Final approval of grant disbursements resides with Spur's Board of Directors. Grants are presented to the Executive Committee each week through an approval poll.
- Grants meeting Spur's due diligence requirements are generally mailed within 7-10 business days.