



Bay Area

community foundation

Donor Advised Fund 2022 Fund Instructions

The Foundation cannot make distributions to fulfill any pledge, obligation, membership or to support any activity from which a donor, fund advisor or related party will receive a benefit.

All recommendations are advisory in nature. Final approval rests in the hands of the governing board of Bay Area Community Foundation whose charge is to see that all distributions are consistent with the purpose of Bay Area Community Foundation.

What Would You Like BACF to Do With Your Spendable Dollars?

Name of Donor Advised Fund: _____

The undersigned authorized representative of the above named fund, pursuant to paragraph 6 of the instrument titled "Endowment Fund Agreement" or "Fund Administrative Agreement," hereby directs Bay Area Community Foundation to disburse spendable assets of said Endowment Fund per the following instructions:

MAKE A GRANT \$ _____

Organization Name: _____

What is the grant's purpose or intention? _____

KEEP \$ _____ **AVAILABLE AS SPENDABLE**

MOVE \$ _____ **SPENDABLE DOLLARS TO ENDOWMENT TO BUILD MY FUND**

By signing below, I certify that this recommendation does not represent the fulfillment of any pledge, membership or other financial obligation, nor will the undersigned receive any benefit(s) as a result of this recommendation.

Fund Advisor Signature	Date
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Fund Advisor Signature	Date
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Please mail or email this signed form to the Program Officer at the Bay Area Community Foundation. Upon approval of the grant, a confirmation will be sent to signer(s) above that the grant has been processed.

BACF OFFICE USE ONLY:

The CEO, in collaboration with the program staff approves this distribution and affirms that this/these grant(s) is/are for charitable purposes within the guidelines of Bay Area Community Foundation Donor Advised Fund Guidelines & Procedures and is in compliance with IRS regulations.

President and Chief Executive Officer	Date	Program Staff	Date
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Date submitted for payment: _____ Grant #: _____ Check Number: _____ Date Mailed: _____

Confirmation message sent? Date: _____ Initials: _____

Tracked in FE? Date: _____ Initials: _____