Grant Recommendation Form

1 **Donor-Advised Account Name** _____ **Account #** _____

2 **Recommended Recipient Charity**

Grants from a Donor-Advised Account may not be used for a pre-existing pledge or private benefit.

Organization's Official Name

Organization's Mailing Address

City State Zip

Organization's Tax ID Number

Special Purpose (e.g. annual campaign, in memory of, etc.)

( ) Phone Contact Person (if known)

$ Recommended Amount of Grant
(Minimum of $250 in $10 increments)

3 **Grant Timing**

☐ Issue this grant as soon as possible.
(Grants must first be approved by the Grant Committee which meets weekly.)

☐ Issue this grant on a standard recurring basis.

_____ Time interval (e.g. monthly, quarterly)

Start (mm/dd/yy) End (mm/dd/yy)

4 **Pool Recommendation**

Recommend the Pool(s) from which this grant should be drawn.

Stock Investment Pool _____ Bond Investment Pool _____ Balanced Investment Pool _____ Short Term Reserves Pool _____

5 **Acknowledgement for This Grant Recommendation**

Grants to charities are accompanied by a letter that includes the name(s) of the individual(s) to be thanked by the charity for recommending the grant. Please check a box to designate who shall be acknowledged for the grant.

☐ The individual(s) named on the Donor-Advised Account

☐ Please issue this grant **ANONYMOUSLY**

☐ Please issue this grant **PARTIALLY ANONYMOUSLY**
(Indicate Donor-Advised Account name only.)

☐ The following individual(s) in lieu of those named on the Donor-Advised Account:

Name(s)

Address

City State Zip

6 **Signature**

I acknowledge that I have read the Grant Recommendation Guidelines as stated in the Gift Fund Program Circular. I hereby certify that this grant recommendation adheres to these guidelines and that neither I nor anyone will receive any benefit from the recommended charitable organization (e.g., I am not using this to pay for membership fees, dues, tuition, goods bought at auction, etc.) from this grant if distributed, and the grant does not fulfill a pre-existing pledge to the recommended charitable organization.

Signature / / Date ( ) Daytime Phone Number

The Johnson Charitable Gift Fund is a public charity. Johnson Investment Counsel, Inc. provides investment management and administrative services to the Gift Fund.

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