

UNF Charitable Gift Fund

GRANT RECOMMENDATION FORM (Please print or type)

See reverse side for grant recommendation guidelines.

I. DONOR INFORMATION

Name: _____

Mailing Address: _____

Daytime Phone Number: _____

Email Address: _____

II. RECOMMENDED RECIPIENT CHARITY Have you previously recommended a grant to this organization through the UNF Charitable Gift Fund?

Yes No (If no, please provide evidence of the recommended recipient's public charity status.)

Charity's Full Legal Name: _____

Mailing Address: _____

Phone Number: _____

Contact Name at Charity: _____

Federal Tax ID Number: _____

Is there a special purpose for this gift? If yes, please describe (e.g., in memory of):

Please note: the UNF Charitable Gift Fund may contact the recipient charitable organization.

III. PROPOSED GRANT AMOUNT (minimum of \$1,000 recommended): \$ _____

IV. GRANT RECOMMENDATION ACKNOWLEDGMENT

Grants from the UNF Charitable Gift Fund are accompanied by a letter containing the name of the donor so that the charity may show its appreciation. Please mark this box if the grant should be issued anonymously.

V. SIGNATURE

I hereby certify that this grant recommendation adheres to the UNF Charitable Gift Fund Statement of Policies, as amended from time to time; that neither I nor anyone else will receive any impermissible benefit from the recommended charitable organization in exchange for this grant if distributed; and that this grant will not fulfill, in whole or in part, a legally binding pledge to the recommended charity.

Signature

Date

GRANT RECOMMENDATION GUIDELINES

QUALIFIED CHARITIES

Donor advised funds established with the UNF Charitable Gift Fund (“UNFCGF”) may make grants only to those organizations which are public charities as described in Sections 501(c)(3) and 509(a)(1) or (2) of the Internal Revenue Code (“I.R.C.”).

GRANT MINIMUM

It is recommended that each proposed grant be in the minimum amount of \$1,000.

GRANT TIMING

Recommendations may be submitted to UNFCGF at any time; provided however, that any distributions from UNFCGF to Qualified Charities shall be made at or near the beginning of the calendar quarter following the approval of the recommendation.

PROHIBITED GRANTS

No grant distributions shall be made from UNFCGF to an organization which is not a qualified charity as of the date of the distribution. The only exception is that grants to foreign organizations may be considered in limited circumstances, provided that the foreign organization is determined to be the equivalent of a U.S. public charity, and further provided that UNFCGF shall enter into an appropriate written agreement with the foreign organization governing use of the funds for a charitable purpose and requiring annual accountings on the expenditure of such funds until fully expended. This prohibition shall include grants to private foundations and type III supporting organizations as defined in I.R.C. Sections 509(a) and 4943(f), respectively. Additionally, no grant shall be made which would entitle the donor or others to receive goods, services or other benefits in specific consideration for such grant or which would fulfill a legally binding pledge of the donor or others.

TAX TREATMENT OF GRANTS

When UNFCGF makes a grant, it distributes its own assets. Thus, you are not eligible for an additional charitable deduction for this grant because your income tax charitable deduction was available at the time of your contribution to UNFCGF. Please disregard any tax receipt received from the recipient organization.

Direct any questions, your completed form and evidence of your public charity status to:

UNF Charitable Gift Fund
Attention: Maggie Stenehjem, Corporate Secretary
PO Box 82555
Lincoln, NE 68501
Phone: 402-458-1162 or 800-432-3216
FAX: 402-458-1298
maggie.stenehjem@nufoundation.org