

# Donor Advised Fund

Grant Recommendation Request

Questions or Need Assistance?

Call (909) 738-4000 or email info@bfcalf.org



THE BAPTIST  
**Foundation**  
OF CALIFORNIA™

## 1. Donor Advised Fund Account Information

\_\_\_\_\_  
Donor Advised Fund Account Number

\_\_\_\_\_  
Donor Advised Fund Name

## 2. Charitable Recipient

\_\_\_\_\_  
Legal or Official Name of Charitable Organization

\_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Charitable Organization's  
Federal Tax ID Number

(\_\_\_\_) \_\_\_\_ - \_\_\_\_  
Telephone Number

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Contact Name

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Contact Email

## 3. Grant Details

\$ \_\_\_\_\_  
Grant Amount (minimum of \$250)

\_\_\_\_\_  
Additional information for the Foundation Staff

Make this an anonymous gift

\_\_\_\_\_  
Additional Information for the receiving charity (please note  
restrictions below)

\_\_\_\_\_  
NOTE: The Foundation may contact you to confirm this  
information. The Grant Award Letter may include language to  
indicate the Account Holder's wish to waive  
any benefit associated with this grant.

## 4. Restrictions on Grants

**Before you make your recommendation, please review  
these grant restrictions in relation to your grant request:**

- It will not fulfill a pre-existing pledge to the recommended charity.
- Neither the donor nor any individual will receive any goods, services, or other private benefit from the charitable organization as a result of this grant. This means grants may not be used to provide any portion of admission to any charitable event or other benefit functions when the Account Holder would receive a quid pro quo, such as the value of a dinner or the privilege to attend, that if received in return for

a charitable contribution, would reduce an Account Holder's charitable deduction.

- It will not be used for lobbying, political contributions or to support political campaign activities.
- I cannot deduct the grant as I have already deducted my gift to The Foundation. I will disregard any tax receipt from the recommended charity.
- It will not support a private non-operating foundation.
- It will not support a scholarship if any Account Holder or Advisor to this Account (or any relative) is an eligible recipient or has a role in selecting the scholarship recipient

## 5. Signature & Delivery Instructions

**By my signature below I certify that the grant sought by this request shall not be in violation of the restrictions noted above and is otherwise subject to the terms and conditions of the Donor Advised Fund Agreement.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Send Grant Applications to:**  
**Email:** info@bfcalf.org (preferred)

**Mail:** The Baptist Foundation of California  
3210 E. Guasti Road, Ste 640, Ontario, CA 91761