

Grant Recommendation Form



Use this form to make a grant recommendation for a charitable organization.

Section 1: Account Information

ACCOUNT NAME: _____ ACCOUNT NUMBER: _____

Section 2: Recommended Charitable Organization

Charitable Organization Name _____ Federal Tax ID (if known) _____

Full Address _____

Contact Name (if known) _____ Phone (if known) _____ Website (if known) _____

Section 3: Grant Amount

Proposed Grant Amount _____ Please issue this grant: Immediately
 On this date: _____
\$ _____ Recurring: Monthly Quarterly Annually Other: _____
Start date: _____ End date (if applicable): _____

Section 4: Donor Information

Grants to charities are accompanied by a letter that will include the name(s) of the individual(s) recommending the grant. Please check one box to indicate who should be acknowledged for the grant:

Full Anonymity Partial Anonymity – Account Name Only Full Disclosure Other (please specify): _____

Section 5: Special Purpose

Provide any specific grant purpose (for example, a capital campaign or endowment fund). Bluefin Philanthropic cannot guarantee that the organization will honor your request and suggests confirming it with the organization before submitting this grant:

Check if applicable: Name _____
 In honor of _____
 In memory of _____

Section 6: Signature

I acknowledge that the grant must support a tax-exempt charitable organization. I hereby certify that neither I nor anyone related to me: will receive any benefit from the recommended charitable organization (for example, I am not using this to pay for tuition, membership fees, dues, benefit tickets, goods bought at auction, etc.) by way of this grant if distributed, (ii) control the grantee, or in the case of a supporting organization, the supported charity and (iii) the grant does not fulfill a pre-existing pledge to the recommended charitable organization. I understand that I will not be entitled to a tax deduction when the grant is made.

Donor Signature _____ Date _____

