



Grant Recommendation

DAF Account Name: _____ Account No: _____

Recommended Charitable Recipient Information

Charitable Organization: _____

Have you previously recommended a grant to this organization through your DAF account? Yes No

Contact Name at Charity: _____ Phone: _____

Federal Tax ID: _____

Street Address or P.O. Box: _____

City: _____ State: _____ Zip: _____

Grant Amount (\$250.00 minimum, in increments of \$50)

(Written) _____ \$ _____

Recommended Distribution Allocation

Recommend the investment portfolios from which the grant should be made, If no portfolio recommendation is made, the grant funds will be drawn as equally as possible from the portfolios in the account.

- Draw funds equally from all applicable portfolios
- Draw funds from a custom choice of portfolios (see right)

| | |
|-------------------------|--------|
| Growth: | _____% |
| Moderate Growth: | _____% |
| Conservative: | _____% |
| Capital Preservation: | _____% |
| (total must equal 100%) | |

Specify Acknowledgement Options and Special Instructions

Please issue this grant:

- Anonymously
- In memory of _____
- In the name of the Donor Advised Fund
- In the name of an individual _____

Purpose of grant/special instructions: _____

Signature of Account Holder

I acknowledge that I have read the Program Circular. I certify that neither I nor anyone else will receive any goods, services or other private benefit from the charitable organization as result of this grant. This grant does not fulfill a pledge to the recommended charitable recipient. I received a tax deduction for this grant when I contributed funds to The Rotary Foundation. If this grant is going to an educational institution, I understand that the funds are not to follow a particular student.

| | | | |
|-----------------------------|---------------|-----------------------------|---------------|
| _____ Required Signature | _____ Date | _____ Optional Signature | _____ Date |
| _____ Printed Name | | _____ Printed Name | |

You may send this completed form to:
Rotary DAF, c/o NRS
4A Gill Street, Woburn, MA 01801
Fax: (781) 938-0134
Email: RotaryDAF@nrstpa.com

You may also recommend grants through your online account. For assistance, please call (847) 866-3100 or visit www.rotary.org/daf