

Grant Recommendations

Please note, we encourage you to use our secure Account Portal for making Grant Recommendations.

Fund Name:	Account No:
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I recommend that grants in the following amounts be distributed to the charitable organizations indicated below:

Organization:		Amount: (\$100 minimum)	
Attention:	(Helpful)	Tax ID #:	
Address:		Phone:	
		Fax:	
City:	State:		Zip Code:
Special Instructions:			

Organization:		Amount: (\$100 minimum)	
Attention:	(Helpful)	Tax ID #:	
Address:		Phone:	
		Fax:	
City:	State:		Zip Code:
Special Instructions:			

Please indicate disbursement preferences below

Agency Loan Fund	% or \$
Fixed Income – Intermediate Duration	% or \$
Growth Fund	% or \$
Money Market Portfolio	% or \$
S & P 500 Index Fund	% or \$
Responsive Fund Socially	% or \$
Value Equities – Domestic	% or \$
Value Equities – International	% or \$
Total Stock Market Index Fund	% or \$
I do not have a distribution preference (check here)	
Total:	

The above grants do not represent payment towards benefit events or the non-tax deductible portion of memberships; school tuition; personal pledges of financial support or obligation; or any dues except to qualifying religious institutions. No benefit or privilege is to be provided to any person or entity in return for these grants. My signature below affirms my understanding of these conditions.

DONOR/RECOMMENDER SIGNATURE: _____ **DATE:** _____

DONOR/RECOMMENDER NAME (Please Print): _____

DAYTIME TELEPHONE NUMBER OR E-MAIL ADDRESS (in case we have any questions) _____