



THE
GIVING FUND
 A DONOR ADVISED FUND

GRANT RECOMMENDATION FORM

Note: Grants may not be used for any pre-existing pledge or private benefit. Refer to Grant Recommendation Guidelines on next page and in the Giving Fund Policy Guidelines

GIVING FUND ACCOUNT INFORMATION

_____ Giving Fund Account Name	_____ Giving Fund Account Number
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RECOMMENDED RECIPIENT CHARITY

Before making your recommendation, please review the Grant Recommendation guidelines on the following page.

Have you previously recommended a Giving Fund grant to this organization? Yes No

_____ Organization's Official Name <small>(if you are unsure of the organization's official name, please check www.guidestar.org)</small>		_____ Federal Tax ID Number	
_____ Organization's Official Mailing Address	_____ City	_____ State	_____ Zip
_____ Phone	_____ Description of special purpose for this gift if any <small>(e.g., annual campaign, memory of, in honor of, etc.)</small>		

GRANT AMOUNT

Write out recommended amount of grant.

_____ <small>(minimum of \$250 in \$50 increments)</small>	_____ Dollars \$
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WHO SHALL BE THANKED FOR THIS GRANT RECOMMENDATION

Grants to charities are accompanied by a letter which includes the name(s) of the individual(s) in order that the charity may thank them for recommending the grant.

Phone check only one box to designate who shall be acknowledged for the grant.	
<input type="checkbox"/>	Please issue this grant PARTIALLY ANONYMOUSLY (indicate Giving Fund Account name only)
<input type="checkbox"/>	Charity should thank the individual(s) named on the Giving Fund Account
<input type="checkbox"/>	Charity should thank the following individual(s) in lieu of those named on the Giving Fund Account
_____ Name(s)	_____ Address
_____ City	_____ State
_____ Zip	

TIMING OF GRANT

Unless you check one of the two boxes below, the Directors will review your recommendation and, if approved, will **distribute the grant as soon as possible**.

<input type="checkbox"/>	Issue this grant on a specific future date: _____ <small>Date (mm/dd/yyyy)</small>
<input type="checkbox"/>	Issue this grant on a scheduled/recurring basis (e.g., monthly, quarterly, semi-annually or annually)
_____ Time interval	_____ Start Date
_____ Date (mm/dd/yyyy)	_____ to
_____ Date (mm/dd/yyyy)	

SIGNATURE

I acknowledge that I have read the Grant Recommendation Guidelines on the reverse side and the Giving Fund Policy Guidelines. I hereby certify that this grant recommendation adheres to these guidelines and that neither I nor anyone will receive any benefit from the recommended charitable organization (e.g., I am not using this to pay for membership fees, dues, tuition, admission to a charitable event, goods bought at auction, etc.) from this grant if distributed, and the grant does not fulfill a preexisting pledge to the recommended charitable organization.

Signature	Name (please print)	Date	Phone
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Please email completed form to give@bfok.org or fax to 405.948.7862.

GIVING FUND GRANT RECOMMENDATION GUIDELINES

Charitable Organizations: The Giving Fund may make grants only to organizations that are exempt under Internal Revenue Code ("IRC") Section 501(c)(3) and that are classified as public charities under IRC Section 509(a)(1) and applicable regulations and IRS authority.

Grant Minimum: Each grant must be a minimum of \$250 and specified in \$50 increments.

Fees: There is no charge for processing grant recommendations.

Grant Recommendation Limitations: Grant recommendations to non-Southern Baptist charities are subject to review and approval by the Directors of the Baptist Foundation of Oklahoma ("Directors"). All grants must comply with the Giving Fund Policy. Recommended grant recipients must be recognized by the Internal Revenue Service as an organization exempt from tax under Section 501(c)(3) of the Internal Revenue Code and as a public charity under section 509(a)(1) of the Internal Revenue Code. Grants must be used exclusively in furtherance of charitable purposes and the donor, donor advisor or third party cannot receive goods, services or any form of impermissible private benefit from the proposed grant. Grants from the Giving Fund may not be used for any pre-existing pledge* or private benefit (such as school tuition or scholarships sent directly to individuals, dues, membership fees, admission to charitable events or goods bought at charitable auctions). Nor may grants be used for lobbying, political contributions or to support political campaign activities. Any grant recommendation received for any improper purpose will be rejected.

***Note:** A pledge is a verbal or written promise to make a gift to charity. Typically, the amount of the gift is specified at the time the pledge is made. "Pre-existing" means the pledge was made prior to the submission of the grant recommendation to the Giving Fund. If you would like to respond to a solicitation from a charity, you may want to inform the charity you will make a recommendation to the Directors to consider a grant to the organization. For example, you could say, "It is my intention to make a recommendation(s) that The Baptist Foundation of Oklahoma Giving Fund support your organization at its legal address."

Tax Treatment of Gift Fund Grants: When the Giving Fund redeems units from the Giving Fund Account to make grants, the Giving Fund is granting its own assets. Accordingly, you are not eligible for additional charitable deductions for these grants. (Your charitable contribution deduction was available at the time of the contribution to the Giving Fund).

Grant Check Processes:

- The Giving Fund will not forward any enclosures with grants.
- The Giving Fund must make grant checks payable to the recipient organization's legal name, which may be different from the common use name. Grants will be disbursed directly to the recipient organization at their legal address. Donors may not serve as intermediaries.
- Your grant recommendation is non-binding and is subject to review and approval by the Directors. Please allow up to ten business days for review, approval and processing of the grant.
- You may request that grants be issued on a future date (e.g., December 20, 20XX) or at recurring intervals (e.g., monthly, quarterly, semi-annually or annually).
- Confirmation that the grant was approved and sent will be mailed to the primary donor once the grant has been issued.

Special Purpose: Each grant may have a special purpose, such as operating expenses, a particular fundraising campaign, to honor a loved one, etc. If the purpose of your grant is to honor a loved one and you wish to notify the family of the honoree, please include the name and address of the family on the special purpose line.

Giving Fund Services

If you have questions regarding this form or if you require service, please call us at 800.949-9988 Monday through Friday, between 8:00 a.m. and 5:00 p.m. CT.

The Baptist Foundation of Oklahoma
Attn: Client Relations
3800 North May Avenue
Oklahoma City, OK 73112