



THE COMMUNITY FOUNDATION

INFORMATION AND AUTHORIZATION FORM FOR A FUND

I. Donor

Donor

Prefix (Mr./Ms./Dr./etc.): _____

Prefix (Mr./Ms./Dr./etc.): _____

Name: _____

Name: _____

Address: _____

Address: _____

City: _____ State: _____ ZIP: _____

City: _____ State: _____ ZIP: _____

Cell: _____

Cell: _____

Home Phone: _____

Home Phone: _____

Email: _____

Email: _____

Birthdate: _____

Birthdate: _____

II. Fund Name, Type and Establishing Gift

Fund Name: _____

Name: Grants to charitable organizations will be identified as coming from this fund

- Community Impact
 Field of Interest
 Donor Advised
 Designated
 Scholarship

Establishing Gift \$: _____

III. Alternate Address (if applicable)

Name: _____

Name: _____

Organization: _____

Address: _____

Address: _____

City: _____ State: _____ ZIP: _____

City: _____ State: _____ ZIP: _____

Cell: _____

Phone: _____

Home Phone: _____

Time Period: FROM DATE: _____

Time Period: FROM DATE: _____

TO DATE: _____

TO DATE: _____

IV. Connecting Your Interests with the Foundation's Expertise

The Community Foundation has identified the most pressing needs within our region, and we're eager to share these funding opportunities with you as critical needs arise. You can play a vital role in joining fellow fundholders to increase the impact of the grants you make from your fund. To ensure we match your philanthropic passions with impactful opportunities, please indicate which charitable areas are of interest:

Creating an Equitable Community

- Closing the Achievement & Opportunity Gap
- Fostering Racial & Ethnic Understanding & Equity
- Partnering Against Poverty

Strengthening our Region's Vitality

- Supporting Arts & Culture
- Preserving Historical Assets
- Promoting Successful Aging
- Environmental Justice

What other community interests do you care about?

V. Fund/Donor Listing

If circumstances permit, may we list your name(s) among other Foundation donors? Yes No

Please indicate how you would like your name(s) listed:

If circumstances permit, would you like the fund name listed among other Foundation funds? Yes No

VI. Grantmaking Service

All distributions must be directed to 501(c)(3) public charities for charitable purposes. The minimum distribution is \$250.

Would you like your name(s) and address given to grant recipients so they can thank you directly? (Donor Advised Funds and Designated Funds Only) Yes No

Fund Activity & Statements: View your fund activity on-line using our **Donor Portal**.

Quarterly Fund Statements are available through email and the Donor Portal.

Note: Username is your email provided above

VII. Fund Description

In one or two sentences, how would you describe your fund?

Examples: *A retired teacher established this fund to support the changing needs of the community. A Penfield couple established this fund to help fulfill their philanthropic goals.*

VIII. Successor Advisors (Donor Advised Funds Only)

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____

Email: _____

Relationship: _____

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____

Email: _____

Relationship: _____

Please allow advisory privileges during my lifetime.

Please allow advisory privileges during my lifetime.

❖ **By checking the box above, you understand that advisory privileges begin when the fund is established.**

IX. Professional Advisor

Name: _____

Firm: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____

Email: _____

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____

Email: _____

Relationship: _____

Please email a copy of my quarterly statement.

Please email a copy of my quarterly statement.

X. Awareness of Community Foundation

How did you learn about Rochester Area Community Foundation?

Why did you choose the Community Foundation?

DONOR(S)

Signature: _____

Name: _____

Date: _____

Signature: _____

Name: _____

Date: _____

*This memo may be revised or rewritten by the donor at any time. A new signature and date is required.
The most recent document on file at the Community Foundation will be used to create the fund.*