

DONOR ADVISED FUND WORKSHEET

Welcome to donor advised funds at ECF! To ensure your fund agreement and ongoing fund administration are consistent with your intentions, please complete the following information. If you have any questions, don't hesitate to contact Jan Fischer via email - fischer@evanstonforever.org - or telephone - 847.492.0990. *Feel free to adjust these preferences at any time.*

FUND NAME

FUND ADVISORS

Primary Contact *(if there are multiple fund advisors)*

Street Address

City, State Zip

Home Phone

Primary Contact number(s): cell other

Primary contact emails

Alternate contact information or contact information for other fund advisors

Name (s)

Address (es)

City, State, Zip

Phone 1 Phone 2

Email Email 2

Successor Fund Advisors

FUND STATEMENTS AND MAILINGS

ECF previously issued annual fund statements via email, summarizing activity for the year, and including a complete list of grants issued. However, we now have online access to FundWeb so that you can review and print fund activity on your own schedule.

Do you still wish to receive periodic statements by email? Yes No

If Yes, what frequency: Qrtly After grants are issued Upon request

In addition, we can provide you with other information related to the grants you recommend from the Fund. Please indicate which of these mailings you would like to receive:

Copies of thank you letters from grantees Yes No

Other information received from grantees,
such as annual reports and newsletters Yes No

DONOR RECOGNITION

May we list the fund advisors as donors to the Evanston Community Foundation, in our printed annual report? Yes No, we wish to remain anonymous

If yes, please indicate how names should appear:

When a grant is issued from a donor advised fund, we issue a grant letter along with the grant check. The introductory sentence typically reads as follows: *"At the suggestion of Jane and Joe Smith, enclosed is a grant of \$x,xxx for your organization from the Smith Family Fund, a donor advised fund of the Evanston Community Foundation. Please recognize Jane and Dick Smith in your donor listings."*

We can issue the grants in the name of the fund only, or in any other manner you prefer. Please indicate your preferences below.

Grants should be made in the name of

The Fund only, noting the grants is being made at the suggestion of the 'fund advisors'

The Fund donors (please indicate your preference for manner in which donor names appear).

Other, please explain

You may vary your preferences for specific grant recommendations/instructions, by noting in the email recommending the grant. And, you may request specific use(s) for the grants you recommend.

May your name(s) given to grantees? Yes No

Should we include your address in the grant letter to grantees, so they can thank you directly?

Yes No

GRANTMAKING PARTNER OPPORTUNITIES

In addition to recommending grants from the fund, we would like to receive information from the Foundation regarding special community needs, programs and/or special initiatives in our areas of interest that might benefit from distributions from our Fund. Yes No

If yes, our areas of interest would include the following:

Other Instructions/Preferences

Date prepared