

The DonorAdvisedFund

***Handbook
for
Donor
Advisors***



community foundation
for the twin tiers

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Welcome

On behalf of the Board of Directors, thank you for your interest in a Donor Advised Fund with the Community Foundation for the Twin Tiers (CFTT). By establishing a fund, you join a special group of individuals who are committed to philanthropy and who recognize the effective, flexible benefits of our Donor Advised Fund program.

This Handbook for Donor Advisors is designed to inform you about the benefits and features of the Community Foundation Donor Advised Fund program. We encourage you to review this handbook before creating a Donor Advised Fund as well as during the term of your fund. Please feel free to contact the Community Foundation for the Twin Tiers at 570-888-4759 at any time should you have any questions regarding the information in this handbook.

Again, thank you for your commitment to the ideals of philanthropy and for choosing the Community Foundation for the Twin Tiers. We look forward to helping you maximize your charitable giving.

About the Community Foundation

A Donor Advised Fund of the CFTT is an excellent tool to help you carry out your charitable goals. We can help you give, and our professional staff can assist you through its expertise and experience with charitable organizations – both in the region we serve and nationwide.

The Community Foundation, established in 2002, is an organization built for and about people. We're here to serve you. When you create a Donor Advised Fund at the Community Foundation, we get to know you– and you get to know us. Our Donor Advised Fund program, established in 2005, was established to help generous people maximize their charitable giving. Today, individuals, families and businesses appreciate the simplicity of this effective and efficient way of giving – while receiving the most favorable charitable income-tax deductions possible.

The CFTT is a permanent community endowment built by gifts from individuals and organizations committed to the future of the region. We work primarily to improve the quality of life by supporting a wide variety of activities benefiting education, arts and culture, health, human services, community development and civic affairs throughout Bradford, Potter, Sullivan, and Tioga Counties in Pennsylvania and Tioga County, New York.

What is a Donor Advised Fund?

A Donor Advised Fund of the CFTT is a flexible tool to help you meet your charitable goals. We can help you maximize your charitable giving, and our professional staff can assist you through its expertise and experience with charitable organizations. A Donor Advised Fund is a way for you to establish a fund, time your contributions into the fund in a way that meets your circumstances, and recommend distributions to charitable organizations over time. The fund grows tax-free and enhances the amounts ultimately available for charitable purposes.

Getting Started

How to create your Donor Advised Fund

Each Donor Advised Fund is governed by a written agreement between the Community Foundation and the founder of the fund. An agreement takes just minutes to prepare. You can expedite this process by completing the Donor Advised Fund application and forwarding it to the Community Foundation or by calling us at (570) 888-4759.

How to name your fund

As the founder of a Donor Advised Fund, you need to designate the name of the fund on the application form. A fund name can include the founder's name, the name of the founder's family, an individual family member, or some other name that maintains the anonymity of the founder.

How to make your initial contribution

A minimum contribution of \$25,000 is required to establish a Donor Advised Fund. Additional contributions of any size can be made at any time. And, just as with your initial contribution, additional contributions are eligible for tax deductions in the year they are made.

How to contribute assets/property to your fund

All gifts acceptable under the Foundation's gift-acceptance policy can be contributed to a Donor Advised Fund. Contributions can include checks or cash wire transfers, as well as marketable securities. We would be happy to answer any questions you have about gifts of particular assets. Please contact the Community Foundation about gifts of privately held businesses, restricted stock and real estate – which may also be contributed in particular circumstances – so that we may assist in the smooth transfer of these assets.

Naming successor donor advisors

At a donor's request, an individual Donor Advised Fund can be advised by persons representing up to two generations – the donor and one additional generation or individual. If donor advisors do not represent a family, the Community Foundation and the founder determine who shall serve as donor advisors and set a time period after which the donor advisors will no longer serve. At such time as there are no donor advisors, the fund, if not already endowed, becomes an endowed fund of the CFTT and continues to carry its name in perpetuity. The founder may also elect to have a non-endowed fund become endowed after the initial donor advisors are no longer serving. (*See more on endowed and non-endowed funds throughout this handbook*).

Creating endowed and non-endowed Donor Advised Funds

Many Donor Advised Funds are non-endowed. These non-endowed Donor Advised Funds permit their donor advisors to make ongoing recommendations for distributions up to the entire fund balance. Such funds remain non-endowed, unless the founder specifies otherwise, until such time that the fund's advisors are no longer serving.

Other donors create Donor Advised Funds that are endowed. Such funds are invested in perpetuity for growth over time. Donor advisors to these permanent funds may recommend distributions from the funds based on an annual "budget" amount established by the Community Foundation's Board of Directors.* This amount is established by the Board to facilitate fund growth and provide a reasonable amount for annual distribution. Because they are permanent, endowed funds provide a lasting memory of the founder's commitment to philanthropy. Please see the remainder of this handbook for information about how endowed and non-endowed funds operate and are administered.

** This amount has historically been 4 percent of the average market value of the fund for the prior sixteen calendar quarters.*

Options in customizing funds

The Community Foundation offers considerable flexibility for Donor Advised Funds created with gifts of over \$1 million. For example, donor advisors can recommend the use of investment management and/or

strategies outside of the Foundation’s group of investment pools, as well as negotiate fees. Options in customizing funds are subject to approval by the Community Foundation.

Key Features of Our Donor Advised Funds

Compliance with IRS Regulations

All foundations must follow IRS regulations regarding the management of donor advised funds. These regulations stipulate a donor may not retain control over his or her donation. To satisfy these regulations, the Foundation will exercise asset management of the fund. Donors advise the Foundation on grant recommendations during their lifetimes. In compliance with IRS regulations, the Foundation’s Board of Directors retains the right to make final determinations with respect to distributions from the fund.

Grants are made to organizations recognized by the IRS as tax-exempt charitable organizations under Section 501(c)(3) of the Internal Revenue Code. Our grants to these charitable organizations are intended to fall within our broad objectives and priority program areas. IRS regulations prohibit grants from any foundation funds to be used to pay dues for an individual’s membership in an organization, to discharge or satisfy legally enforceable obligations or fulfill personal pledges that have been made by the donor or a family member, or for any other purpose from which the individual will receive any personal benefit. Examples include ticket or table purchases to a fund raising dinner, greens fees for a charity golf tournament, or pledges made by the donor for contributions to a charitable organization. Grants to individuals are also prohibited from donor advised funds. This includes grants to organizations (such as a university) for the benefit of a specified individual.

Donors, advisors or related parties may not receive grants, loans, compensation or similar payments (including expense reimbursements) from donor advised funds. Grants may not be earmarked for a specific individual by the donor advisor. This includes check written directly to an individual or checks written to an entity for the benefit of a specified individual.

About tax deductions

If you itemize your tax deductions, you may claim a federal charitable income tax deduction for your gift to a Donor Advised Fund in the year of contribution. Any charitable income tax deduction you may realize is subject to certain limits, as follows:

<u>TYPE OF CONTRIBUTION</u>	<u>TAX DEDUCTIBILITY</u>
Cash	Up to 50% of adjusted gross income
Long-term, appreciated property	Up to 30% of adjusted gross income

These adjusted gross income limits are actually based on the donor’s tax contribution base, which is adjusted gross income computed without regard for net operating losses. These deductions may also be subject to itemized deduction phase-outs and other limits. Any amount not deducted in the year of contribution may be used during the next five years. If not used in five years or on the donor’s final tax return, any excess contribution is lost. Different limits apply to corporate gifts. Be sure to consult with your tax attorney or accountant to determine the actual tax-deductible value and benefit of your contribution to the fund.

Charitable planned gifts – such as charitable remainder trusts or charitable lead trusts – can be used to fund a Donor Advised Fund. Charitable income tax deductions generated by such gifts receive the most

favorable tax treatment under the Internal Revenue Code, as the Community Foundation Donor Advised Fund is part of a public charity.

About tax reporting

The Community Foundation provides each donor to a Donor Advised Fund with receipt(s) documenting his or her contribution(s), as required under the Internal Revenue Code. For contributed assets requiring an appraisal to determine their tax-deductible value, donors need to obtain an appraisal. In addition, the Community Foundation must report to the IRS the sale proceeds it realizes on the sale of appraised property if the sale occurs within two years of its contribution.

When you establish a Donor Advised Fund, you do not need to keep records of distributions made from your fund to charities. Individual donors receive a tax deduction when they make their initial gift to a Donor Advised Fund and when they make subsequent gifts to that fund. Thus, distributions from the Donor Advised Fund are grants from the Community Foundation. As such, it is not appropriate for you to take a second tax deduction at the time those distributions are made to charities.

About fees

There are no transaction fees for new contributions to your fund, investment pool changes or distributions to other charities. Donor Advised Fund fees vary based on the asset value of the individual Donor Advised Fund. Each Donor Advised Fund is charged a Community Foundation administrative fee and it's pro rata share of investment management fees for the risk/asset allocation pool or the endowment pool in which it is invested.

An annual Community Foundation administrative fee, which is charged to the fund yearly, is as follows:

Endowed Donor Advised Funds	Assets up to \$1,000,000	2.00%
	\$1 million - \$4 million	1.50%
	\$4 million - \$10 million	1.00%
	\$10 million +	0.75%
Non-endowed Donor Advised Funds	Assets up to \$1,000,000	3.00%
	\$1,000,000 - \$4,000,000	2.50%
	\$4 million - \$10,000,000	2.00%
	\$10 million +	1.50%

A minimum annual administrative fee of \$250 applies to each Donor Advised Fund. These fees are paid from the fund and do not require additional payment by the founder/donor advisor to the fund.

In addition a one-time set-up fee of \$250 will be charges on all new incoming funds after June 30, 2011 for setting up of the financial record. And a one-time 2% foundation sustainability charge with a minimum threshold of \$250 will be charged to grow the CFTT Operating Endowment Fund.

Each Donor Advised Fund pays its pro rata share of the investment management fees for the investment pool in which it is invested. These investment fees vary, depending on the nature of the individual Donor Advised Fund (endowed or non-endowed) and, in the case of non-endowed funds, the investment pool in which it is invested.

Please contact us if you would like to know the current expense ratios (which include investment management fees) for our investment pools. Please contact us if you would like additional information

regarding any fee that may be charged to your Donor Advised Fund. Again, these fees are paid by the Donor Advised Fund and do not require additional payments by its founder and/or donor advisors.

About the perpetuity of funds

Upon the death, resignation or incapacity of all donor advisors, an individual Donor Advised Fund becomes a named, flexible, discretionary endowed fund of the Community Foundation unless otherwise provided. In this way, the name of the fund is perpetuated, recognizing the donor's charitable interests forever. In some cases, the founder of a Donor Advised Fund may establish that upon the death, resignation or incapacity of all donor advisors that the fund be maintained to support a charitable field of interest or support named charities. If a Donor Advised Fund does not have the then-applicable minimum balance for an endowed fund at the time all donor advisors are no longer serving –currently \$25,000 – the assets of the fund will be placed in the Foundation's discretionary endowment and the Donor Advised Fund's name will cease.

How the Donor Advised Funds are invested

The Community Foundation provides several different investment strategies based on the endowed or non-endowed status of an individual Donor Advised Fund. Endowed funds: The Community Foundation's endowment pool is generally used for all endowed Donor Advised Funds, unless the initial fund is greater than \$1 million. If requested and approved, funds over \$1 million may utilize a separate investment manager. If the Community Foundation approves the use of another investment manager, such funds are placed in the Foundation's endowment investment pool once all donor advisors are no longer serving.

Non-endowed funds: The Community Foundation provides these investment strategies for the management of non-endowed Donor Advised Funds. These strategies are reflected in three investment pools consisting of no-load, daily valued mutual fund products. These strategies include:

- Prime Money Market Pool
- Balanced Investment Pool
- Growth Investment Pool

The Board of Directors of the CFTT, with the assistance of its Finance/Investment Committee and investment consultant monitor the asset allocation, mutual fund selections, performance (net of investment management fees) and fees for each of the investments.

Donor advisors to non-endowed Donor Advised Funds may recommend that their funds be invested in one of these pools. Donor advisors may also suggest that the investment pool be changed at the end of each calendar year, if desired. To suggest such a change, donor advisors should make their recommendation by the 15th of the twelfth month of each calendar year.

Non-endowed Donor Advised Funds are invested by the Community Foundation in its Balanced Pool if no investment pool is recommended by a fund's donor advisor(s) and the Community Foundation has no other advice regarding the possible timing of distributions from the fund.

Financial "partner" investment pools

In addition to the Community Foundation investment pools, the Foundation can engage a number of financial institutions to manage investment pools for its Donor Advised Funds. While the underlying mutual funds in these pools may not be the same as the Community Foundation's investment pools, the asset classes that comprise those investment pools are the same. Further, the Community Foundation's

Finance/Investment Committee and its investment consultant approve all investments in these pools and monitor the pools for asset allocation, mutual fund selections, performance (net of investment management fees) and fees. Please contact the Community Foundation if you would like to know more about the participating financial “partners” and any investments held in those pools. Individual donor advisors may recommend that their investment pools be managed by one of the Community Foundation’s Donor Advised Fund financial “partners.”

Making Distributions from Your Fund

Recommending distributions from your Donor Advised Fund is simple. For a list of frequently asked questions, turn to Appendix B on page 9. In the meantime, we recommend that you read and become familiar with the following information on how to recommend distributions from your fund.

How to suggest distributions from your fund

As a donor advisor, you may recommend that distributions be made from your Donor Advised Fund at any time. Under current federal tax law, there are no mandatory annual distributions required from Donor Advised Funds – unlike the mandatory distributions required of private foundations. Also, please feel free to take advantage of the knowledge and expertise of the Community Foundation’s staff. They can provide you with valuable information regarding local community needs and nonprofit organizations, and assist you with questions about specific nonprofit organizations. In addition, the Community Foundation will keep you updated on its activities through its website, news releases, and annual report during the year. To assist you in making your recommendations, the Community Foundation can provide information on specific charitable needs.

All recommendations for distributions from Donor Advised Funds are subject to staff review and the review and approval of the Board of Directors of the Community Foundation. The following guidelines must be followed with respect to recommendations for distributions:

- Recommendations for distributions should be submitted in writing. Retain a copy for your records.
- Please use a Donor Advised Fund Grant Recommendation Form to request distributions (Appendix D).
- The minimum recommended distribution is \$500.
- An unlimited number of distributions are permitted from each fund.
- Distributions may be made to any tax-exempt charitable organization within the United States, provided it meets the qualifications set forth by sections 170(c) or 501(c)(3) and 170(b)(1)(A) of the Internal Revenue Code; gifts may not be distributed to any type of private foundation, including private operating foundations.
- Distributions may not be used to satisfy any personal or corporate pledge or obligation of a donor or advisor, or to provide a benefit to a donor or advisor unless the benefit is permitted by the then-applicable Internal Revenue Code and related regulations. The CFTT can make a pledge of future support from the fund for a donor. Such a pledge would be limited to the current assets in the fund.
- U.S. tax law does not permit the use of charitable dollars to be used to pay membership dues and/or fulfill a personal pledge and/or to secure benefits from the distribution recipient, (e.g., museum memberships, tickets to benefits, etc.). The fund could make grants to charities “in lieu of tickets” or the advisor may indicate to a charitable institution that he or she will recommend a grant from the fund.
- U.S. tax law does not permit the use of charitable dollars for earmarking grants for a specific individual by the donor advisor. This includes checks written directly to an individual or checks written to an entity for the benefit of a specified individual.

- U.S. tax law does not permit donors, advisors or related parties from receiving grants, loans, compensation or similar payments (including expense reimbursements) from donor advised funds. Donor advisors to non-endowed Donor Advised Funds may make suggestions for distributions that distribute the entire balance of the fund. In the case of endowed Donor Advised Funds, donor advisors may recommend distributions up to their annual fund “budget,” as well as any carryover amounts from previous years. This distribution “budget” is determined annually by the Foundation’s Board of Directors. It has historically been 4 percent of the average value of the fund for the prior sixteen calendar quarters. This amount is computed in the fourth quarter of each year.

How distributions are processed

Individual recommendations for distributions are processed within 10 business days of receipt.

How distributions are acknowledged

A letter accompanies each distribution to a charitable organization. The donor advisor receives a copy of that letter and a copy of the distribution check. Unless otherwise requested, the letter to the charitable organization identifies the donor advisor(s) to the Donor Advised Fund who recommended the distribution.

Quarterly reports

Donor advisors to a Donor Advised Fund receive quarterly reports for every quarter where grant activity has occurred that summarize the activities of the fund. The report shows contributions, market value fluctuations and distributions to charities.

Disclaimer

All Donor Advised Funds are component funds of the Community Foundation. Accordingly, the Community Foundation will not be bound by the advice of donors or advisors with respect to the investment or administration of its Donor Advised Funds. Investments of the Community Foundation Donor Advised Funds are investments of the Community Foundation and are subject to the approval of its Board of Directors. As such, the asset allocations, underlying investments and investment managers for these funds are the responsibility of and within the control of the Community Foundation. Investments within Donor Advised Funds are not the investment of the founder or donor advisor(s) and therefore are not subject to any federal or Pennsylvania securities registration or law.

The information contained in this handbook is intended to inform founders, donors and professional advisors to Donor Advised Funds of the administrative and tax rules applicable to these funds. The information contained in this handbook, and the policies governing the administration of Donor Advised Funds, is subject to change, without notice, by the Board of Directors of the Community Foundation for the Twin Tiers. Changes will be made, as necessary, to ensure compliance of the Donor Advised Fund program with any applicable federal or state law or regulation.

Appendix A

Donor Advisor Services Guidelines

How the Community Foundation works with you

These guidelines provide you, the donor advisors and prospective donor advisors of the Community Foundation for the Twin Tiers, with information on what you should expect in working with the Community Foundation. We look forward to helping you reach your charitable goals each year and we welcome your input and suggestions.

As a donor, we encourage you to communicate freely and frequently with us. Communication fosters understanding and helps us to efficiently administer your contributions and respond to your distribution suggestions. You may communicate with us in person, by telephone, mail, e-mail or facsimile. We welcome your visits to our offices. As we work with you in the years ahead, we will be pleased to meet with you at your home or office if that will better meet your communication needs.

During office hours, telephone calls are handled directly by staff. If we take a phone message or you leave a message in voicemail, we will return your call within one business day – preferably the same day. We review our voicemail messages frequently, even when out of the office, to better respond to your needs.

Confidentiality of donor information

Information about Community Foundation donors is confidential. We do not disclose financial information, individuals' ages or other personal information without the donor's consent. While we can make no legal claim of confidentiality, such as the attorney-client privilege, it is our policy to maintain your confidence so that we may have frank, honest discussions about your charitable goals.

The Community Foundation's policy and practice is to publish the names of its donors and fund names in the annual report and other selected publications. However, if you so request, we will not list your fund name in our annual report or other publications. We use your mailing information only as a means to communicate with you, so we can keep you informed of your fund activity and of Community Foundation activities and opportunities.

Information on charitable giving and organizations

To assist you in meeting your charitable goals, we are pleased to provide you with information on charitable-giving techniques, such as planned giving, as well as information about charitable organizations you may wish to support through the Community Foundation.

In our relationship with you and with other donors, we encourage the involvement of your professional advisors. Our guidelines clearly prohibit our providing you with legal services and, thus, we encourage you to solicit legal and other professional advice, as needed, to ensure that your arrangements and dealings with the Community Foundation are appropriate and beneficial to you.

No discrimination

Community Foundation policies and guidelines encourage donors to participate in charitable activities throughout the region served by the Foundation. As such, the CFTT does not discriminate against donors or grantee organizations because of age, sex, race, national origin, creed, religion or sexual preference. At any time, funds may be established to benefit particular groups whose needs are not being fully addressed by other sources and/or to promote the needs of disadvantaged groups.

Appendix B

Frequently Asked Questions about Distributions from a Donor Advised Fund

You can recommend distributions from your Donor Advised Fund at any time. Just provide your recommendations in writing and we'll process your suggestions. Feel free to use the suggestion forms you receive once you establish a Donor Advised Fund. As always, we are pleased to answer any questions you may have.

Q: May I recommend support for the general operating budget of a charity?

A: Yes, it is fine to suggest a distribution for general support, as well as distributions for capital campaigns or specific projects.

Q: May I recommend a distribution in lieu of tickets for a fund-raising event?

A: Yes, you may recommend such a distribution in support of a fund-raising event, as long as tickets are not purchased.

Q: I would like to recommend a distribution to complete a pledge I have made to a charity. Is that all right?

A: Unfortunately, such a recommendation is not appropriate under the regulatory limitations placed on Donor Advised Funds, since charitable dollars cannot be used to pay a personal obligation. However, a Donor Advised Fund *can* make a pledge that is paid from the Fund. Please contact the Community Foundation if you would like additional information on Donor Advised Fund pledges.

Q: I would like to support my Alma mater, which is located in another state. Is this possible?

A: Yes. You may recommend support to any 501(c)(3) public charity in the United States.

Q: Will I be notified when a distribution that I have recommended has been made?

A: Yes. We will promptly mail you a copy of the distribution letter and check so you'll know it has been paid.

Q: Now that I have established a Donor Advised Fund, I'd like to wait until later this year to recommend any distributions from the fund. Is that permissible?

A: You may recommend distributions at any time – now or in the future. You may even wait until a future year to do so.

Q: What about memberships for charitable organizations – can I recommend a distribution to cover these?

A: Because a membership provides a personal benefit to you, the Community Foundation will not make distributions for memberships.

Q: Are there any other types of distributions that are inappropriate for a Donor Advised Fund?

A: Because Donor Advised Funds are regulated under federal tax rules, such funds are not able to make distributions that benefit a specific person. Also, Donor Advised Funds cannot make distributions to private foundations or any nonprofit that is not a 501(c)(3) public charity.

Q: May I raise additional money to place in a Donor Advised Fund through a fund-raising event?

A: You and/or others may make additional gifts to a fund you establish. However, as an advisor, raising money for your fund through a fund-raising event may expose you and the Community Foundation to liability. Accordingly, we do not accept money from fund-raising events.

Q: I can think of a few distributions where I might want to remain anonymous. Is this possible?

A: Yes. All you need to do is to let us know in writing that you wish to remain anonymous for a particular recommended distribution(s). Just like always, you will receive notification when the distribution is made – but it will not identify you to the charity or in our publications, per your request.

Q: Sometimes I am not 100 percent sure about the status or reputation of a particular charity that I am considering. Can your staff assist me?

A: The Community Foundation staff has extensive knowledge of the tax-exempt charitable organizations and community needs. We are pleased to provide information and assist in your consideration.

Appendix C
Information and Authorization Form for Donor Advised Funds

I. Donor Name(s)

Name: _____	Name: _____
Address: _____	Address: _____
_____	_____
Date of Birth: _____	Date of Birth: _____
Spouse's Name: _____	Spouse's Name: _____

II. Fund Name _____

Grants to charitable organizations will be identified as coming from this fund name.

III. Addresses

A.) Preferred mailing address. *Fund statements and other mail from the CFTT will normally be sent to this address.*

Type: _____
(home, business, summer, winter, etc.)
Name: _____
Street: _____
City, State, Zip: _____
Phone: _____

B.) Other addresses

Type: _____	Type: _____
Street: _____	Street: _____
City, State, Zip: _____	City, State, Zip: _____
Phone: _____	Phone: _____
Effective dates: _____ (If applicable)	Effective dates: _____ (If applicable)

C.) Email address: _____

Would you like to receive information from the Community Foundation via email? Yes ___ No ___

IV. Anonymity

A.) Donor anonymity

Do you want your name(s) given to grantees? Yes ___ No ___ Depends, ask me each time ___
Do you want your address given to grantees so they can thank you directly? Yes ___ No ___
Do you want to be identified as a donor to the Community Foundation? Yes ___ No ___
Do you want your name(s) listed in Community Foundation publications? Yes ___ No ___
If yes, please indicate how you would like your name(s) to appear:

B.) Fund anonymity

May we list your Fund in our annual report or other publications? ___ Yes ___ No

Do you want the Fund amount listed in the annual report? ___ Yes ___ No

V. Charitable Interests

I/We are interested in the following charitable areas:

- | | | |
|--|--|---------------------------------------|
| <input type="checkbox"/> Aging | <input type="checkbox"/> Environment | <input type="checkbox"/> Youth |
| <input type="checkbox"/> Arts & Culture | <input type="checkbox"/> Families | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Basic Human Needs | <input type="checkbox"/> Health | _____ |
| <input type="checkbox"/> Civic Engagement | <input type="checkbox"/> Neighborhoods | _____ |
| <input type="checkbox"/> Early Childhood Development | <input type="checkbox"/> Recreation | _____ |
| <input type="checkbox"/> Education | <input type="checkbox"/> Women & Girls | _____ |

VI. Grantmaking Service

Please check all that apply:

- Contact me only when you have a question about my suggestions.
- I will contact you if I need services or information.
- Please provide me with grantmaking suggestions in my areas of interest.
- Contact me with grantmaking suggestions only if I have not recommended grants during the past twelve months.
- I am interested in developing a personalized grantmaking program.
- I would like to receive information about community issues/concerns, especially in the areas of:

- I would like to be able to recommend grants on-line.

VII. Awareness of Community Foundation

The following questions are optional; however we do appreciate your input.

How did you learn about the Community Foundation for the Twin Tiers?

Why did you choose to establish a fund at the Community Foundation?

VIII. Additional information for Charitable Endowed and Non-Endowed Funds

A.) The following persons are authorized to make distributions from my/our fund:

- | | |
|------------------------------|------------------------------|
| Name: _____ | Name: _____ |
| Address: _____ | Address: _____ |
| City, State, Zip: _____ | City, State, Zip: _____ |
| Phone: _____ | Phone: _____ |
| Relationship to donor: _____ | Relationship to donor: _____ |

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Relationship to donor: _____

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Relationship to donor: _____

Signature

Signature

Date

Date

Appendix D
Donor Advised Fund Grant Recommendation Form
So that we may serve you better, please complete this form as fully as possible.

As an advisor to the _____ Fund, _____
Date

I (we) suggest the following grant(s) of \$500 or more:

Organization name: _____
 Contact person name & title: _____
 Address: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Amount: \$ _____ I wish to remain anonymous to the grantee: ___ Yes ___ No
 Purpose of grant (e.g., general operations, capital campaign, specific program, endowment, etc.). Support for: _____

Organization name: _____
 Contact person name & title: _____
 Address: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Amount: \$ _____ I wish to remain anonymous to the grantee: ___ Yes ___ No
 Purpose of grant (e.g., general operations, capital campaign, specific program, endowment, etc.). Support for: _____

Organization name: _____
 Contact person name & title: _____
 Address: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Amount: \$ _____ I wish to remain anonymous to the grantee: ___ Yes ___ No
 Purpose of grant (e.g., general operations, capital campaign, specific program, endowment, etc.). Support for: _____

The distribution(s) suggested above are advisory only and do not represent satisfaction or discharge of any pledge or other financial obligation. In addition, the distribution(s) will not result in any personal benefit to the undersigned, such as a membership, tickets to events, etc.

Advisor's signature	Date	Phone Number	E-mail Address

Advisor's signature	Date	Phone Number	E-mail Address

Please mail this form to the Community Foundation to the address below. Please retain a copy for your records.
 The Community Foundation for the Twin Tiers, 107 W. Lockhart Street, Unit 2, Sayre, PA 18840
 Phone: 570-888-4759 Fax: 570-888-2179 www.twintierscf.org cfft@stny.rr.com

Appendix E
Sample Letter to Owner of Donor Advised Fund

November 1, 2009

Name
Address
City, State, Zip

Dear :

We are once again in a grant cycle and respectfully present the following proposals for your consideration. Your Fund has \$10,577 available for grants.

1. Big Brothers Big Sisters requests program and general operating support.
2. Communities that Care has applied for program support of its conflict management and bully prevention training programs in the schools (for teachers and students).
3. Nightlife on the Susquehanna seeks support for its community programs and this season to bring these performances to Bradford County school students.
4. Partners in Family and Community Development requests a local match for a federal grant that will build the first phase of affordable housing for homeless women with children.
5. Sexual Abuse Task Force seeks support for the salary of the nurse performing the forensic examinations of sexual assault survivors.
6. Bradford County Regional Arts Center provides curriculum based arts programming in the rural school districts in Bradford and Sullivan Counties, particularly schools that would not otherwise purchase arts programs.

Attached are grant summaries, a Donor Advised Fund Grant Recommendation Form and a stamped return envelope. As we have done in the past, we will match these projects with as many donors as possible to get the full grant amount but your support will give the Community Foundation the greatest flexibility. Please send me your recommendations by December 1st.

Thank you for your continuing interest and generous support. Your fund has made a great difference in so many lives in the region served by the CFTT.

Respectfully,

Marilyn Bok
E-mail: cftt@stny.rr.com
Enclosures