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GRANT RECOMMENDATION FORM

INSTRUCTIONS

Return by email to grantrec@rsfsocialfinance.org or by mail to: RSF Social Finance, PO Box 2007, San Francisco, CA 94126

QUESTIONS?

Contact the Philanthropic Services Team at PS@rsfsocialfinance.org

I. FUND INFORMATION

DONOR ADVISOR NAME

FUND NAME

II. GRANT RECOMMENDATION (For additional recommendations, please complete additional forms, ask us about our spreadsheet, or send in your own spreadsheet with the details on this form.)

I/We recommend a grant in the amount of \$ ______ be made from the above named fund to the following charitable organization. (If recommending a grant to RSF or to an existing fund at RSF, you only need to include the fund or project name.)

NAME OF CHARITABLE ORANIZATION				
ADDRESS				
CITY	STATE		ZIP	
CONTACT PERSON AT ORGANIZATION		EMAIL		
ORGANIZATION'S TAX ID (EIN) NUMBER (IF KNOWN)				
PURPOSE OF GRANT: GENERAL OPERATING SUPPORT SPE	ECIFIC PROJECT / FUN	1D		
GRANT RECURRENCE				
lacksquare Yes, this is a recurring grant. I/We wish the grant to recur	r 🔲 quarterly, or 🕻	annually		
with a start date of and	d end date of			
GRANT ACKNOWLEDGEMENT				

I/We wish 🖵 to remain anonymous / 🖵 for the fund to be named in the grant award letter and in donor listing.

III. RELATIONSHIP DISCLOSURE (Please attach additional page if necessary.)

I/We have set forth below any and all relationships, familial, business or otherwise, that I/we have with any of the beneficiaries or grantees of any organizations set forth in this Donor Grant Recommendation. I/we understand that RSF may, at its option, withhold, withdraw or demand immediate return of all funds from such organizations if I/we fail to make timely, accurate and complete disclosure of such relationships.

IV. REQUIRED SIGNATURE

By signing below, I/we acknowledge that this grant will not fulfill an existing pledge (an existing pledge is one made before this grant has been approved by RSF); provide a benefit, goods or services for any specific individual or myself/ourselves or my/our family; pay for dues, membership fees, tuition, goods from charitable auction; support a political campaign or lobbying activity; to support a private non-operating foundation; or to support a Type III non-functionally integrated supporting organization.

I/We understand that this is a recommendation and not a direction. I/We understand that the grant recommendation is subject to RSF review and approval in accordance with its policies and applicable law. RSF may turn down the grant recommendation if the grant does not meet criteria for approval.

SIGNATURE

DATE

PHONE NUMBER

TITLE (for organization funds)