

donorservice@vanguardcharitable.org

Contact us

888-383-4483

with questions

Recommend a grant

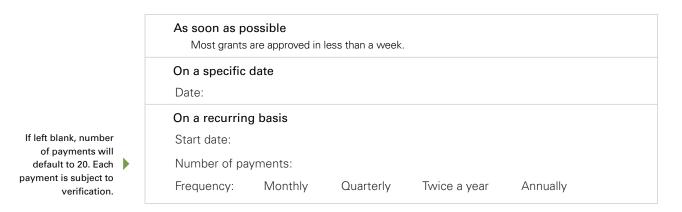
Use this form to recommend a grant to charity from your philanthropic account. For quicker processing times, enter this grant online. If you require extra space, include additional sheets. Please do not staple. For more information, refer to our *Policies and guidelines* booklet.

1 Account information



2 Grant schedule

Select when the grant should be issued. If an option is not selected, the grant will be issued as soon as possible.



3 Charity information

Grants are made payable to a charity's legal name, which	Charity legal name	EIN if availa	able	
may differ from its	Have you previously recommended a grant from Vanguard Charitable to this charity?			
common name.	Yes No			
	Street address or P.O. box number			
	City	State Zip		
	Web address			

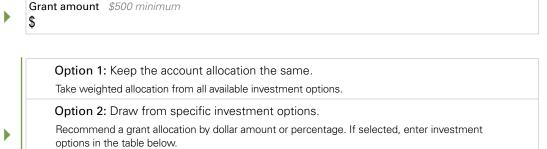
Enter the name of an individual at the charity who can answer questions about the grant.

Charity contact				
Name first and last				
Title	Preferred phone			
Email address				

4 Amount and allocation

If this is a recurring grant, enter the amount for **one** grant payment.

Select how the grant will be distributed from the account. If no option is selected, the account allocation will remain the same.



Option 3: Distribute the account balance.

Grant the account's entire balance and close the account.

Complete this section	Investment option	Percentage	OR	Dollar amount	OR	All shares
only if you selected Option 2. Provide one unit (percentage, dollar or all shares) for each investment option.		%		\$		
		%		\$		
		%		\$		

5 Grant purpose

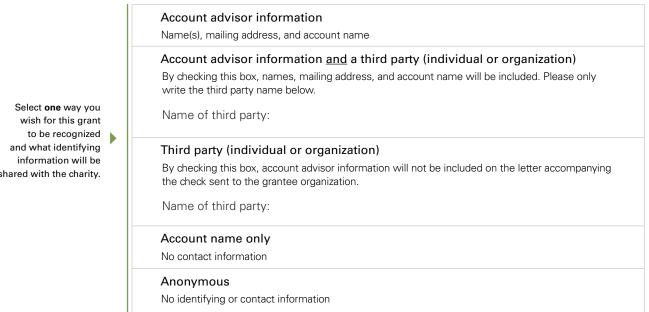
If a purpose is not selected, the grant will be made in support of general operating expenses. For information on granting for a specific purpose, refer to our *Policies and guidelines* booklet.

	Unrestricted gift		
	General operating expenses		
	Capital expenditure		
-	Underwriting cost of an event		
	Enter the name and description of the event in the box below.		
	Missionary support		
	Enter a description and location of mission, or name of missionary project in the box below. If the grant will support a specific missionary, enter the person's name and location in the box below.		
	Grant cannot support a specific mission, missionary project, or named missionary who is related to an authorized user on this account.		
for the grant.	Scholarship		
	Optional: Enter a scholarship description or name in the box below.		
	Grants cannot be made in support of a scholarship when a) a specific individual is named, b) an authorized user on this account has a role in selecting the scholarship recipient, or c) an authorized user on this account or anyone related to an authorized user may benefit.		
-	Annual fund		
-	Capital campaign		
-	Class gift		
	Optional: Enter a description in the box below.		
	Specific project		
	Enter a description of the project in the box below.		

Additional information

6 Recognition and permission to publish

This is how you will be identified by the recipient organization.



Additional attribution

In memory of In honor of

Please notify

If applicable, fill in the first and last name of an individual who a) you wish to be notified about this grant and b) is employed by or associated with the charity. The charity is responsible for notifying any and all individuals listed here.

Permission to publish

Select this box if you want the grant letter to instruct the recipient not to publish any of this grant's information in its newsletters, annual reports, web pages, or other materials. This restriction extends to the names of advisors, the account, or other individuals or organizations you entered.

If you leave this box unchecked, the recipient organization may publish grant information at its discretion.

Please do not publish my name.

shared with the charity.

Ar

7 Required signature

By signing below, I certify on behalf of all authorized parties on this account that:

There is <u>no agreement</u>, written or verbal, in place with the grantee organization that may:

- modify the grant purpose in any way.
- allow you and other Disqualified Persons* any legal right to direct the use of the funds.
- support a legally binding pledge, fulfill a grant, or satisfy a legal obligation that you, another Disqualified Person, or an organization that is not eligible to receive grants from Vanguard Charitable may owe to the grantee organization.
- support any expenses related to a Disqualified Person including but not limited to, tickets, auctions, sporting events, admission, scholarships, missionary support or other cash, goods, services or grants.
- require the grant funds to be used to fund a lobbying communication that reflects a view of support or opposition to specific legislation.

Further, you certify that:

- you will not claim an additional charitable deduction for this grant recommendation, even if the grantee organization erroneously sends a charitable contribution tax deduction substantiation letter to the recommending donor or account advisor.
- you do not control the grantee organization, either solely in your individual capacity or together with other Disqualified Persons.
- if the recommended grant is for a supporting organization, neither you, nor any Disqualified Person directly or indirectly control any supported organization of the grantee.
- you have no reason to believe grant funds will be used in violation of any Office of Foreign Assets Control (OFAC) Rule(s) as defined by the U.S. Department of the Treasury, and you agree to notify Vanguard Charitable if you become aware that grant funds may be used in violation of any OFAC Rule(s).
- I have read Vanguard Charitable's Policies and guidelines booklet.

	Signature	Date	mm-dd-yyyy
authorized account user must sign here.	Х		

Return information	Email:	donorservice@vanguardcharitable.org We recommend encrypting the form and sharing
Return this form and required documentation to Vanguard		the password with us.
Charitable. Any attachments or	Fax:	866-485-9414
enclosures will not be forwarded to grant recipients.	Mail:	Vanguard Charitable
		P.O. Box 9509 Warwick, RI 02889-9509

*A Disqualified Person includes you and any other account advisors, other authorized parties on your account, your family members, and certain entities that you own or control.