



**Donor Advised Grant Recommendation Form**

Please note: To submit your request electronically, please visit [miamifoundation.org/login](http://miamifoundation.org/login) to sign into the Donor Portal and view your Fund activity.

As the Advisor to the below-referenced Fund, I recommend that the Board of Trustees of The Miami Foundation consider the following grant (one grant request per form). I understand and agree to the following **Grant Restrictions**:

- The Miami Foundation makes grants to 501(c)(3) public charities and government entities with United States affiliation, and will assist in processing international grants for which an additional fee may apply.
- Grants cannot be made for memberships, fulfillment of legally binding pledges, tickets to events, or anything else that provides benefits to the Fundholder. Grants cannot be made to individuals.
- Fundholders, their advisors, and related parties may not receive grants, loans, compensation or similar payments (including expense reimbursements) from Fundholders advised Funds.

Grants are processed on a weekly basis and the deadline to receive requests is Tuesday at noon. If received after the deadline, the request will be processed the following week. See the following page for additional **Grant Process** details.

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**1. Name of Donor Advised Fund:** \_\_\_\_\_

**2. Grantee Information**

- a. Organization’s Legal Name: \_\_\_\_\_
- b. Organization’s Tax I.D.: \_\_\_\_\_
- c. Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_
- d. Mailing Address: \_\_\_\_\_
- e. Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**3. Grant Amount, Purpose and Payment**

- a. Grant Amount: \_\_\_\_\_
- b. Purpose (if other than general support): \_\_\_\_\_
- c. Payment: If the Foundation has the Grantee’s bank instructions on file, it will issue the payment as an electronic transfer (ACH). If you would like to opt-out and have the payment issued as a check, please mark the box below.

OPT OUT OF ACH PAYMENT FOR THIS GRANT

**4. Special acknowledgement notes or mailing instructions:**

**5. Certification:**

I understand this recommendation is advisory only and that final authority over all distributions made by the Foundation rests with the Board of Trustees, whose charge it is to ensure all grants are made for charitable purposes consistent with Internal Revenue Service Guidelines and the mission of The Miami Foundation. I certify this grant recommendation adheres to the stated Grant Restrictions. I acknowledge that language to this effect may be added to the grant transmittal letter.

Advisor Name (please print): \_\_\_\_\_ Date: \_\_\_\_\_

Advisor Signature: \_\_\_\_\_



## Grant Processes

- All grant recommendations are reviewed and approved by The Miami Foundation Board of Trustees.
- The Miami Foundation processes grant checks on a weekly basis and the deadline to receive requests is Tuesday at noon. If received after the deadline, the request will be processed the following week.
- To make our processes more paperless and efficient for our Fundholders.
  - If The Miami Foundation has bank instructions for the Grantee on file, grants will be processed as an electronic transfer (ACH). If the Fundholder would like to opt-out and have the grant issued as a check instead, that preference must be indicated on each grant recommendation form. There is no additional fee to process grants by ACH.
  - We will be transitioning to sending via email copies of the grant letter sent to the grantee – for both ACH and check payments - to all pre-selected Fund advisors and contacts on record.
- If the Fundholder would like to expedite delivery and send the grant via wire, a wire fee charge of approximately \$35 will be assessed to the Fund.