

DAF Distribution Request Form



In order to comply with IRS regulations concerning donor advised funds (DAFs), this form must be completed and returned to The Orchard Foundation prior to each DAF distribution.

Organization Name			
Street Address, City, State, Zip			
Specific Purpose Designation			
Distribution Amount		Is this an anonymous gift?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you directly or indirectly control this organization or any organization related to this organization?			<input type="checkbox"/> Yes <input type="checkbox"/> No

Organization Name			
Street Address, City, State, Zip			
Specific Purpose Designation			
Distribution Amount		Is this an anonymous gift?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you directly or indirectly control this organization or any organization related to this organization?			<input type="checkbox"/> Yes <input type="checkbox"/> No

Organization Name			
Street Address, City, State, Zip			
Specific Purpose Designation			
Distribution Amount		Is this an anonymous gift?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you directly or indirectly control this organization or any organization related to this organization?			<input type="checkbox"/> Yes <input type="checkbox"/> No

DAF Name: _____

Donor Name: _____

Donor Signature: _____ Date: _____

Distribution Guidelines:

1. The Foundation shall consider any recommendation for distribution made by the Donor in accordance with the guidelines as set forth in the DAF agreement between the Donor and the Foundation. All distributions by the Foundation from the Fund shall be to or for the benefit of an organization described in IRC Section 501(c)(3) or such distributions must qualify as a charitable contribution as defined in IRC Section 170(b)(1)(A). The Foundation retains the power in the Foundation's sole discretion to modify or withhold any distribution of income or principal if such distribution would otherwise fail to qualify for a charitable purpose as defined in IRC Section 170(b)(1)(A) and IRC section 4966. Private Foundations are not eligible beneficiaries of this donor advised fund.
2. The Donor reserves the right to advise the Foundation to make distributions to other qualifying charities.
3. Recommendations that would benefit the Donor privately, or Donor's family members, or that do not further the "exempt purposes" detailed in the DAF agreement between the Donor and the Foundation, will not be honored, although the Donor will be given other opportunities to make alternate recommendations. The decision to grant or deny any such recommendations shall be made at the sole discretion of the Foundation for the mutual protection of the Donor and the Foundation.
4. The Donor is hereby advised that a letter may be sent from the Foundation to each benefitting organization requesting additional information in order for the Foundation to comply with IRS code 4966.

Helping God's People Use God's Resources to Fulfill God's Calling