



## REQUEST TO ESTABLISH A FUND

As a potential Donor/Fundholder, there are several ways we can establish a Fund for you at the Town of Yountville Community Foundation. We will set up the Fund in your name, in the name of your family or business, in the name of your nonprofit organization, or in honor of any person or other organization you choose.

- DONOR ADVISED FUND** - Donor Advised Funds may be endowed or non-endowed. The donor creates a fund without naming any specific charitable institutions and retains the right to recommend grants to charitable organizations of his or her choice over time.
- FIELD OF INTEREST** - Field of Interest funds allow donors to address a broad area of concern without naming specific charities at the time the fund is established. The donor names the category of donee to be considered, such as the arts, education, the environment, families and children, health, community building, a geographic area, or other field of interest.
- DESIGNATED FUND** - A Designated Fund is a fund that names a specific not-for-profit organization or organizations to receive grants from the fund. If the beneficiary of a Designated Fund ceases to exist and the donor has not named a contingent beneficiary, the Board will preserve the donor's intent by redirecting the distributions from the fund to the organization with the closest similar mission.
- SCHOLARSHIP AND AWARD** - A donor, which can include an individual, family, company, or organization, can recognize outstanding achievement of individuals through a Scholarship or Award Fund. The donor identifies the class of individuals he or she wishes to assist and the criteria to be used and may serve in an advisory capacity.
- ORGANIZATION/PARTNER ENDOWMENT FUND** - This fund type, which is sometimes referred to as an agency endowment, holds assets for a named charitable organization and generally distributes investment income to that organization on a semiannual or annual basis according to the TOYCF's Distribution Policy.

<b>Date:</b>	<b>Initial Fund Deposit:</b> \$ _____
<b>FUND TYPE</b> <input type="checkbox"/> <b>DONOR ADVISED</b> <input type="checkbox"/> <b>FIELD OF INTEREST</b> _____ <input type="checkbox"/> <b>DESIGNATED FUND</b> <input type="checkbox"/> <b>SCHOLARSHIP/AWARD</b> <input type="checkbox"/> <b>ORGANIZATION/PARTNER</b>  <p style="text-align: center;"><b>We will draft the Fund Agreement based on this information</b></p>	
<b>Fund Name:</b>	
<b>Contact:</b>	
<b>Address:</b>	
<b>Phone:</b>	
<b>Email:</b>	
<b>EIN/TAX ID NUMBER:</b>	

<p><b>What do you want to money to be used for?</b></p>          
<p><b>How many funding disbursements do you anticipate each year?</b></p>          

**How do you anticipate contributing to the Fund?**

- Cash
- Marketable Securities
- Real Estate
- Tangible Personal Property
- Insurance Beneficiary
- Retirement Plan Beneficiary
- Bequests
- In-Kind
- Other \_\_\_\_\_

**OFFICIAL USE ONLY**

APPROVED     DENIED     MODIFIED: \_\_\_\_\_  
\_\_\_\_\_

**Date Fund Created:** \_\_\_\_\_

**Treasurer Initials:** \_\_\_\_\_