



Here for Oregon. Here for Good.

Congratulations! Your organization was approved for an advised fund grant.

An advised fund is established when a donor makes a tax-deductible donation to The Oregon Community Foundation. Donor advisors offer OCF's board recommendations as to how the donated dollars should be granted to organizations. These recommendations are taken under close advisement by the board. When a recommendation is approved, an organization receives a grant award.

- According to IRS rules, no direct benefits or services may be offered to fund advisors which are not available to the general public without charge. This includes memberships, event tables, discounts, and the like. *Fund advisors may be subject to fines by the IRS if this grant results in a direct benefit or service.*
- Advised Fund grants cannot be used to satisfy a pledge. The IRS views pledge fulfillment as a direct benefit to fund advisors because it alleviates the advisors of a personal financial obligation. *Fund advisors may be subject to fines by the IRS if this grant is used as a pledge payment.*
- The award letter indicates how the advisor prefers to be recognized. Typically, the full fund name should appear such as the John and Jane Smith Fund of The Oregon Community Foundation.
- This grant is from OCF, rather than individual advisors.
- You do not need to send a gift receipt to OCF or the fund advisor. If you wish to contact the advisor, refer to the contact information in the award letter. If no contact information is listed, the advisor has chosen to remain anonymous.
- If an evaluation report is required, it will be specified in the grant award letter. Excluding a required evaluation, it is not necessary to send any additional information to OCF.

Who can answer questions about this grant?

Contact a Donor Relations Associate at 503.227.6846 or advisedfunds@oregoncf.org. Also, you may read more about advised fund grants on www.oregoncf.org.

The mission of The Oregon Community Foundation is to improve life in Oregon and promote effective philanthropy. OCF works with individuals, families, businesses and organizations to create charitable funds to support the community causes they care about. Through these funds OCF awarded more than \$70 million in grants and scholarships in 2013.