



Your organization is recommended for an advised fund grant.

Please complete an organization profile form so we may learn more about your organization and its mission. We may share this information with fund advisors and/or OCF's Board.

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.

- This request for information is **neither a proposal nor guarantee of funding**.
- **There is no formal application process for advised grant funding.** An organization whose mission corresponds with OCF's Community Grants Program objectives is encouraged to submit a proposal. Complete information about the Community Grants Program is available at www.oregoncf.org. Proposals reviewed through the Community Grants Program may be shared with fund advisors who have expressed interest in funding particular organizations, programs, or regions.
- An advised fund grant is from OCF, rather than individual advisors.
- **According to IRS rules, no direct benefits or services may be offered to fund advisors that 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 an advised 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 an advised grant is used as a pledge payment.*

Who can answer questions?

Contact Xantha, Tara, or Travis at 503-227-6846 or advisedfunds@oregoncf.org. Also, you may read more about advised funds 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 awards more than \$55 million annually in grants and scholarships. Since OCF's founding in 1973, it has distributed more than \$500 million in grants and scholarships.