

Grant recommendation form

- Use this form to request a grant recommendation from your fund. GlobalTrust reviews the purpose of each grant recommendation and verifies that the grantee is qualified (based on the organization's mission statement and tax-exempt status). Grant recommendations are approved once all information is in order.
- The minimum grant recommendation amount is \$100.00.
- Distributions may be requested at terry@globaltrustfunds.org. Contact us for more information.
- Mail to GlobalTrust Fund, PO 5161, Greenwood Village, CO 80155

Recommended by:

Your name: _____ Phone: (_____) _____ - _____

Mailing address: _____

Email address: _____

Grant recommendations:

Organization A: _____ To

the attention of (if applicable): _____ EIN (if applicable): _____

Address: _____ City, State, Zip: _____

Phone: (_____) _____ - _____ Website: _____ Total amount \$: _____

☐ Anonymous Grant purpose (if applicable): _____

Organization B: _____ To

the attention of (if applicable): _____ EIN (if applicable): _____

Address: _____ City, State, Zip: _____

Phone: (_____) _____ - _____ Website: _____ Total amount \$: _____

☐ Anonymous Grant purpose (if applicable): _____

By signing this form, I represent, warrant, and agree to and with the foundation represented on this form, and GlobalTrust Fund that neither I nor the donor/giver or advisor (or any person or entity related to the donor/giver or advisor) have been conferred or promised any benefit that is more than incidental as a result of this grant, and if offered or presented with any such benefit, I will not accept. Such benefit includes, but is not limited to, tuition and other educational costs; admission to any event (or the right to separately purchase such admission if the general public may not purchase such admission for the same price and under the same terms); or the cancellation or fulfillment of a legally binding pledge or other personal financial obligation. Thank you for allowing us to serve you.

Giver signature

Date

Fund #

GRANT RECOMMENDATION GUIDELINES

Upon receipt of your grant recommendation, GlobalTrust's research team, will complete the due diligence review process. If a grant recommendation is not able to be qualified or approved, GlobalTrust will notify the giver and the giver will be given the opportunity to revise the recommendation.

Please review the following guidelines to assist you as you make your grant recommendations and to expedite your requests.

GlobalTrust will not approve or make any grants recommended by the giver if such grant would, in whole or in part, be used for an impermissible purpose, including, but not limited to, the following:

- To confer an impermissible private benefit upon any individual(s), including the giver.
- To be used to pay dues, membership fees, greens fees, tuition, etc.
- To purchase tickets to, or a meal at, a benefit.
- To purchase goods at a charitable auction.
- To fund a pre-existing, binding pledge which the donor is legally obligated to fulfill.
- To be used for lobbying, political contributions, or political campaigns (501c (4) ministries do not qualify for tax deductible contributions).
- To be made to the benefit of a private foundation that is not a private operating foundation (private, non-operating foundations are impermissible).

In any event, GlobalTrust reserves the right, in the exercise of its sole and absolute discretion, to approve or disapprove any recommendations for grants or distributions.

GlobalTrust will reject grant recommendations for impermissible grants and for any other improper purposes. In the event GlobalTrust discovers that a previously-made grant would constitute an impermissible grant, it may take remedial action to have the amount of any impermissible grant returned to GlobalTrust. In addition, GlobalTrust may require that (a) the giver make an additional non-deductible contribution to GlobalTrust, or (b) the giver indemnify GlobalTrust for any costs, fees, expenses or damages incurred by GlobalTrust as the direct result of an impermissible grant made upon the recommendation of the giver.

If you have any questions regarding the qualification of your grant recommendation or for our expanded giving guidelines, please contact us using the contact information provided at the bottom of this page.