

# GRANT RECOMMENDATION

Please refer to guidelines on next page.



DONOR INFORMATION (Please print)	
Name:	Account Number:

GRANT AMOUNT Indicate below either a dollar amount or percentage.	
\$ _____	OR _____ %

RECIPIENT CHARITY ORGANIZATION INFORMATION (Please print)		
If you are unsure of the organization's legal name and/or mailing address, visit <a href="http://www.guidestar.org">www.guidestar.org</a> .		
Have you previously recommended a grant to this organization through Univest Foundation?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Organization's Legal Name:	Federal Tax ID Number: ■ ■ - ■ ■ ■ ■ ■ ■ ■ ■	
Mailing Address:		
City:	State:	Zip:
Contact Name:	Phone Number:	
Optional special purpose for gift? (For example, operating expenses, in memory of, to honor, etc.)		

ACKNOWLEDGEMENT	
Grants to charities are accompanied by a letter that includes the name(s) of the individual(s) recommending the grant so the charity may thank them. <b>Please check only ONE box to indicate who should be acknowledged for the grant.</b>	
<input type="checkbox"/> The individual(s) named on the account	<input type="checkbox"/> The name of the account only <input type="checkbox"/> Anonymous

TIMING OF GRANT	
<input type="checkbox"/> As soon as possible	<input type="checkbox"/> Issue this grant on a specific date: ■ ■ / ■ ■ / ■ ■ ■ ■ ■ ■ ■ ■ M M D D Y Y Y Y Y
<input type="checkbox"/> Issue this grant on a scheduled/recurring basis. The grant amount will be sent for each scheduled occurrence.	
<b>Frequency:</b> <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semiannually <input type="checkbox"/> Annually	<b>Start Date:</b> ■ ■ / ■ ■ / ■ ■ ■ ■ ■ ■ ■ ■ M M D D Y Y Y Y Y
	<b>End Date:</b> ■ ■ / ■ ■ / ■ ■ ■ ■ ■ ■ ■ ■ M M D D Y Y Y Y Y

I acknowledge that I have read the Grant Recommendation Guidelines and the Univest Foundation Program Circular. I certify that neither I nor anyone else will receive any benefit from the recommended charitable organization (for example, I am not using this to pay for membership fees, dues, tuition, goods bought at auction, etc.) from this grant if distributed. I certify that this grant recommendation is not in fulfillment of a legally binding pledge.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# GRANT RECOMMENDATION GUIDELINES



## CHARITABLE ORGANIZATIONS

Univest Foundation may make grants to organizations which are tax-exempt under Internal Revenue Code (or IRC Code) Section 501(c)(3) and public charities under Internal Revenue Code (or IRC Code) Section 509(a).

## GRANT MINIMUM

Each grant must be a minimum of \$100 and can be specified for any amount above that.

## FEES

There is no charge to accounts for the processing of grants.

## LIMITATIONS

Grants from Univest Foundation may not be used for private benefit (such as school tuition or scholarships sent directly to individuals, dues, membership fees or goods bought at charitable auctions). Grants may not fulfill legally binding pledges. Nor may any grants be used for lobbying, political contribution or to support political campaign activities. Any grant recommendation received for any improper purpose will be rejected.

## GRANT CHECK PROCESSES

- Univest Foundation will not forward any enclosures with grants.
- Univest Foundation must make checks payable to the recipient organization's legal name, which may be different from the common use name (e.g., Harvard University's legal name is President and Fellows of Harvard College) and mail the checks to the organization's mailing address. Grants will be disbursed directly to the recipient organization at their mailing address. Donors may not serve as intermediaries.
- Your grant recommendation is **non-binding** and is subject to review and approval by Univest Foundation. Please allow up to ten business days for review, approval and processing of the grant.
- You may request that grants be issued on a future date (e.g., December 20, xxxx) or at recurring intervals (e.g., monthly, quarterly, annually in June, etc.). The donor will be advised of scheduled disbursements via email, if desired.

## SPECIAL PURPOSE

Each grant may have a special purpose, including operating expenses, a particular fundraising campaign, to honor a loved one, etc. If the grant is for a capital campaign, it may not fulfill a legally binding pledge. If the purpose of your grant is to honor a loved one and you wish to notify the family of the honoree, please include the name and address of the family on the special purpose line.

If you have any questions regarding this form or you require service, please call Univest Foundation at 215.703.5247 between 8:00 AM and 5:00 PM EST Monday through Friday or email [univestfoundation@univest.net](mailto:univestfoundation@univest.net).

Please submit the completed Authorization Request to Univest Foundation via mail: P.O. Box 64559, Souderton, PA 18964. Or, you may submit via fax: 215.721.4010.