



Grant Suggestion

From a Johnson Charitable Gift Fund Account

1. From Account Name: _____ **Account #:** _____

2. To Organization: Grants may only be made to qualified charitable organizations. See Program Circular for details.

Name of Organization		
Street Address		
City	State	Zip
Federal Tax ID Number (if known)		Telephone Number

3. Information for the Receiving Charity: _____
(example: in memory of, in honor of, annual campaign)

4. Amount: \$ _____ **(Minimum of \$250)**

Immediately **OR** At Recurring Intervals _____
(5 Year Maximum Time Frame) Interval (example: monthly, quarterly)

Start (mm/dd/yy) End (mm/dd/yy)
(5 Year Maximum Time Frame)

5. Grant Acknowledgement:

Grants to charities are accompanied by a letter that includes the name(s) of the individual(s) to be thanked by the charity for suggesting the grant. Please designate who shall be acknowledged for the suggestion.

Account Name & Donor-Advisor(s) Name(s) Account Name Only Anonymous

The following individual(s) in lieu of the donor-advisor(s) (name and address): _____

6. Any Notes to the Gift Fund Staff?:

The Johnson Charitable Gift Fund is a public charity and has final authority over all grants. Johnson Investment Counsel, Inc. provides management and administrative services to the Gift Fund.

I understand that these suggestions must be in accordance with IRS regulations covering charitable distributions and CANNOT be used to:

- Fulfill a pledge
- Support a political campaign or lobbying activities
- Pay for raffle or event tickets, memberships, dinners, or dues
- Pay for personal expenses or other activities that provide a personal benefit

I understand that under the Pension Protection Act of 2006, I could be assessed a penalty if I receive more than an incidental benefit as the result of a distribution from my donor-advised account. I further understand that I cannot deduct the grant as I have already deducted my donations to the Johnson Charitable Gift Fund and I will disregard any tax receipt from the charity.

Signature

Print Name

Date