



Giving Portfolio Designation Form

PFA.FRM.GPDE.1008

Increasing Effective Giving

Giving Portfolio Designation Form

Donors of the Philanthropy Fund may choose to allocate their contribution across the Philanthropy Fund Index or to a Pre-Built Giving Portfolio that targets a specific field of interest. Donors may also recommend up to five organizations that he or she feels is deserving of support. All recommended nonprofit organizations must be reviewed by the Philanthropy Fund and approved by its Board of Directors before receiving any grants. Donors may also select any combination above the above options.

Please designate how you would like your contribution allocated by checking all options that apply and indicating the appropriate percentage. Percentages must total 100%.

Donate _____% of my contribution across the Philanthropy Fund Index.

To identify effective and deserving nonprofits for grant-making, the Philanthropy Fund has formulated an array of subjective and objective measuring tools to assess the 1.5 million organizations in the United States. In addition to these tools, the Philanthropy Fund is relying upon private and community foundations to further evaluate nonprofits for inclusion in our index. Based upon these tools and analysis, we have created the Philanthropy Fund Index comprised of the nonprofit organizations that receive our grants.

Donate my contribution to the Pre-Built Giving Portfolio selected below according to the indicated percentages.

_____ % *Child Welfare*

This portfolio supports regional and national nonprofit organizations seeking to improve the lives of children through medical services, education, childhood disease prevention, homelessness and hunger.

_____ % *Poverty & Hunger Prevention*

This portfolio supports regional and national nonprofit organizations seeking to prevent poverty through employment programs, educational programs, mental health services, and food and shelter services.

_____ % *Medical Research*

This portfolio supports regional and national nonprofit organizations tackling the major diseases challenging the health of our society including, but not limited to, cardiology, diabetes, cancer and obesity.

_____ % *Environmental Conservation*

This portfolio supports regional and national nonprofit organizations targeting environmental conservancy through programs targeting green development, energy efficiency, land conservation and environmental cleanup.

I would like to submit the following deserving nonprofit organization(s) for review by the Philanthropy Fund Board of Directors. (please complete page 2 of this form)

Our process provides that 100% of your donation goes to grants for nonprofits; however, if you would like to allocate a portion of your donation to the Philanthropy Fund to assist with administrative costs, please indicate the amount here: \$ _____

Donor 1 Name: _____ Phone: _____

Donor 1 Signature: _____ Date: _____

Donor 2 Name: _____ Phone: _____

Donor 2 Signature: _____ Date: _____

Giving Portfolio Designation Form

I would like to submit the following deserving nonprofit organization(s) for review by the Philanthropy Fund Board of Directors. I have provided the name and mailing address of each organization I wish to support. If I have recommended more than one nonprofit, I have also indicated how I wish to allocate my donation with the appropriate percentages.

Nonprofit Organization #1 Percentage Allocation

Street Address City State Zip

Nonprofit Organization #2 Percentage Allocation

Street Address City State Zip

Nonprofit Organization #3 Percentage Allocation

Street Address City State Zip

Nonprofit Organization #4 Percentage Allocation

Street Address City State Zip

Nonprofit Organization #5 Percentage Allocation

Street Address City State Zip

I understand that all recommended nonprofit organizations must be reviewed by the Philanthropy Fund and approved by its Board of Directors before receiving any grants.

Donor 1 Name: _____ Phone: _____

Donor 1 Signature: _____ Date: _____

Donor 2 Name: _____ Phone: _____

Donor 2 Signature: _____ Date: _____