

**STABLISH FOUNDATION DONATION REQUEST**

Name on Trust: \_\_\_\_\_

Date: \_\_\_\_\_ Donation Amount: \_\_\_\_\_

How should checks be made payable? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

When do you want the funds sent? Immediately: \_\_\_\_\_ or Date: \_\_\_\_\_

Are the funds to be: Hand-delivered: \_\_\_\_\_ or Mailed: \_\_\_\_\_

If Delivered:

Who should we mail funds to for delivery? Agent: \_\_\_\_\_ or Client: \_\_\_\_\_

Address for Mailing: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If Mailed:

Name of Charitable Organization: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Would you like the funds applied to the general fund \_\_\_\_\_ or \_\_\_\_\_?

Would the client like to receive an acknowledgement direct from the recipient charity? Yes or No  
(please circle one)

\_\_\_\_\_

Is there a company match we should apply for? \_\_\_\_\_ If yes, please provide the details.

Any Special Instructions or Notes regarding the donation: