



COMMUNITY FOUNDATION  
OF  
NORTHWEST MISSOURI

## Fund Start Up Form

Please complete and return this form to The Community Foundation of Northwest Missouri to start the process of opening a fund. Upon receipt, staff will draft a fund agreement and contact you to complete the process.

What type of fund would you like to establish?

Donor Advised - *This fund allows the donor to recommend how their gift is used. Grant awards are issued to charities in the name of the fund (or anonymously if the donor prefers), and contributions to the fund qualify for income tax deduction in the year they are made.*

Field of Interest - *The donor instructs The Community Foundation to use the available grant dollars in an area of interest, such as education, health, youth, the environment and so forth, rather than restricting the money to one organization.*

List the charitable purpose (ex: arts, education, health, etc.) \_\_\_\_\_

Designated - *The donor instructs The Community Foundation to pay available grant dollars to one or more specific named charitable organizations, usually perpetuity. Organizations are specified at time of fund set up.*

List Organization(s) to receive donations

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What would you like to name the fund?

\_\_\_\_\_

Is the fund endowed?

Yes (Grants are limited to 5% of the fund's earnings each year)

No (Grants are made from principal and earnings)

How would you like the fund invested?

Community Foundation's Pools

Personal Financial Advisor

Advisor Contact Information \_\_\_\_\_

List Advisors or committee members for the fund including name, address, phone, and email.

\_\_\_\_\_  
\_\_\_\_\_

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Who will be authorized to suggest distributions \_\_\_\_\_

\_\_\_\_\_  
Donor Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email

**Return to:**  
**Community Foundation of Northwest Missouri, Inc.**  
**Attn: Stacey Helfery**  
**1006 W St Maartens Dr, Suite B**  
**St Joseph, MO 64506**  
**816.232.2022**  
**Or**  
**stacey@cfnwmo.org**