



Donor Advised Fund Application and Prequestionnaire

- 1. Name of Donor(s):
2. Name of Fund. The name of Fund shall be:
3. Donor's Contribution. Donor irrevocably assigns, conveys, transfers and delivers \$
a. Please select your preferred method of funding account:
- Check
- Wire Transfer
- Securities
- Other
4. Preferred Field of Interest: As a security to ensure your funds are always designated with your faithful intent, please consider your preferred field of interest as referenced in paragraph 4 of the agreement.
- Parish Life
- Catholic Education and Formation
- Social outreach
- Catholic Philanthropy
5. Additional gift: The donor wishes to make a contribution to the Catholic Foundation of Michigan Endowment for the long-term financial support of building Catholic philanthropy in the amount of \$
6. Information Release. Donor hereby grants permission for Fund name to be shared
a. In Foundation annual donor reporting (i.e. annual report)
b. When providing grants to benefitting organization(s).
7. How did you hear about the Catholic Foundation of Michigan?
- Donor initiated
- Referred by pastor
- Referred by a professional advisor
- Through Catholic Foundation marketing
- Through a school/parish partnership
- Other:



Designation of Fund Advisors: Please identify up to 2 people to serve as advisors to the fund.

Name		Name	
Mailing Address		Mailing Address	
City/State/ZIP		City/State/ZIP	
Primary Phone	Second Phone	Primary Phone	Second Phone
Email Address		Email Address	

Optional Successor Advisors: identify 2 people to serve as successors to the above advisors to the fund.

Name		Name	
Mailing Address		Mailing Address	
City/State/ZIP		City/State/ZIP	
Primary Phone	Second Phone	Primary Phone	Second Phone
Email Address		Email Address	