



Endowment Application and Prequestionnaire

DONOR OPENING CONTRIBUTION

- 1. Name of Fund. The name of Fund shall be: NAME
2. Purpose of the Fund shall be:
3. Donor's Contribution. Initial Contribution of: (\$), as a charitable contribution to the Catholic Foundation of Michigan. Funding Method: (check one)
4. Distributions: (check one)
5. Additional gift: The donor wishes to make a contribution to the Catholic Foundation of Michigan Endowment for the long-term financial support of the Foundation in the amount of \$
6. Media Release. Donor hereby grants permission for Fund name to be used in Foundation promotional materials (e.g. website, annual report, newsletter etc.).
7. Termination of the Fund: As a security to ensure the funds are always designated with your faithful intent, please consider an additional endowed fund or 501c3 beneficiary to be referenced in paragraph 7 of the agreement:
8. How did you hear about the Catholic Foundation of Michigan?



DONOR INFORMATION

Donor

Print Name

Address

City/State/ZIP

Email

Phone

Secondary Donor *(if desired)*

Print Name

Address

City/State/ZIP

Email

Phone

Quarterly Electronic Fund Statements and Correspondence should be sent to:

Donor (Contact information above will be used)

Other (Please complete information below)

Print Name

Title/Organization

Address

Email

City/State/ZIP

Phone

For Nonprofit Entities:

Board Approval

➤ Board Resolution approving the transfer of funds date: _____

➤ Resolution and/or letter of approval attached YES NO, Date expected _____



Beneficiary information
(needed upon creation of the fund)

Beneficiary Legal Name	
Mailing Address	
Street	
City/State/ZIP	
City, State, Zip	
Primary Phone	Federal Tax ID #
Phone	EIN:
Website	Facebook Link
Website	Facebook
Twitter Handle	LinkedIn Link
Twitter	LinkedIn

On Site Organization Contact

Name	
Primary Phone	Secondary Phone
Phone	Phone
Email	Linked IN
Email Address	LinkedIn

Board Liaison(s)

Name:	
Name	
Primary Phone	Email
Phone	Email Address

Promotion

- 2 High Resolution Photos for Foundation Publications attached YES NO
- Public description describing the fund for donor portal _____
