



# Grant Recommendation FORM



This form allows DAF Advisors to make grant recommendations with ZLC Foundation (“the Foundation”). Grants may be recommended at any time throughout the year. DAF Advisors may select the annual payout timing and determine much to grant to each eligible charity. As much as possible, the Foundation will make the recommended grants within ten business days after receipt of the recommendation.

Please refer to the ZLC Foundation DAF Policies and Guidelines (the “Policies and Guidelines”) document for further information on making grant recommendations.

Please email a copy of the completed form to [donorservices@zlc.net](mailto:donorservices@zlc.net).

## ACCOUNT INFORMATION

Donor Advised Fund Name (the “DAF”):

Account No:

## DIRECTION AND ACKNOWLEDGEMENT

I acknowledge that while the recommended charities on the following page are currently registered as charities with the Charities Directorate of the Canada Revenue Agency and they are considered qualified donees under the Income Tax Act (Canada) and therefore eligible for a grant from ZLC Foundation. In the event that any one or more of such selected charities either ceases to operate or loses its status as a qualified donee, the grant recommendation will be declined and the Foundation will seek to notify the DAF Advisor and request a revised recommendation.

I also acknowledge that these recommendations are only recommendations, and they are subject to approval by the Board of Directors of the Foundation.

I hereby confirm that my family and those not at arms-length from me, will not receive any benefit or advantage from any of the grants that I recommend nor are any of the grants to fulfill a legally binding pledge agreement. I also understand that no tax receipt will be issued to me by the recipients of these grants.

DAF Advisor Name:

DAF Advisor Signature:

Date:

## RECOMMENDED GRANTS

Please check here if the instructions below are intended to REPLACE any pre-existing recurring grant recommendations on file with ZLC Foundation.

Additional information attached (if your list of grants requires more space, please provide on a separate instruction page)

Charity Name	CRA Registration #	Amount	Disclosure to Charity	Special Instructions
Charity 1				
Additional information				
Charity 2				
Additional information				
Additional information				
Charity 3				
Additional information				
Charity 4				
Additional information				
Charity 5				
Additional information				

### Contact us

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