

### I. Introduction

This form allows donors to make grant recommendations with Benefaction Foundation (“Benefaction”). Grants may be recommended at any time throughout the year. Donors may select the annual payout timing and determine how much to allocate; however, the minimum annual spending requirement (disbursement quota) as determined by the Canada Revenue Agency is applied to all Benefaction donor advised funds each year. The minimum grant amount is outlined in Benefaction’s Grants Policy. Approved grant recommendations will be processed within 10 business days of receipt of the funds into a Benefaction bank account.

Please email a copy of the completed form to [donor\\_services@benefaction.ca](mailto:donor_services@benefaction.ca), or you can provide it to your advisor directly to pass on to Benefaction.

### II. Account Information

Donor Advised Fund Name (the “Fund”)	Account No.
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### III. Direction and Acknowledgement

I/We 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 Benefaction 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 Board of Directors of Benefaction may in their discretion distribute the amount mandated by the then current granting policy of Benefaction to such other qualified donees providing services or conducting activities which are similar to my/our selected charity. I/We also acknowledge that these recommendations are only recommendations, and they are subject to approval by the Board of Directors of Benefaction. In the event that I/we do not provide any grant recommendations, or the recommendations are not sufficient after being contacted by Benefaction then Benefaction shall disburse the funds required according to the aforesaid granting policy. I/We hereby confirm that my/our family and those not at arms-length from me, will not receive any benefit or advantage from any of the grants that I/we recommend nor are any of the grants to fulfill a legally binding pledge agreement. I/We also understand that no tax receipt will be issued to me/us by the recipients of these grants.

\_\_\_\_\_  
Donor name\*

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Date

\* Please note that any named Donor for the Fund may submit grant recommendations.

### IV. Recommend Grants

- Please check here if the instructions below are intended to REPLACE any pre-existing recurring grant recommendations on file with Benefaction
- Additional information attached (*if your list of grants requires more space, please provide on a separate instruction page*)

Charity Name	CRA Registration #	Amount (\$ or % of DQ)*	Frequency	Disclosure to Charity
Charity 1				
Additional information: Add any special instructions for your grant such as the name of a specific program you would like to fund, a contact person at the charity, or specific timing when you would like your grant to be issued.				
Charity 2				
Additional information				
Charity 3				
Additional information				
Charity 4				
Additional information				
Charity 5				
Additional information				
Charity 6				
Additional information				
Charity 7				
Additional information				
Charity 8				
Additional information				
		<b>TOTAL (\$ or %)</b>		

\*% of DQ: Percentage of your Annual Disbursement Quota. Example: Charity 1 receives 25% of the annual DQ, Charity 2 receives 30%, and Charity 3 receives 45%. These types of instructions allow Benefaction to calculate the grant amount for each grantee based on the minimum amount available to grant annually.