



NOMINATE A GRANT TO A CHARITABLE ORGANIZATION

- Complete all sections of this form (Steps 1–4). Please use a separate form for each charity.
- Send your completed form to: 11 Bridge Square, Suite 200, Northfield, MN 55057 Fax: 507.645.6408

PROVIDE CHARITABLE GIFT ACCOUNT INFORMATION

ACP Account Number _____ Account Name _____

Nomination Made By _____

NOMINATE A CHARITABLE ORGANIZATION

Recommend a charity to receive a grant. (See Grant Nomination Guidelines that follow.)

Name of Charitable Organization _____

Special Project Name (if applicable)* _____

Mailing Address _____

Contact Name (if applicable) _____

Telephone Number _____

Charitable Organization's Federal Tax ID Number (Required) _____

Specify Acknowledgement Options. (If no selection is made, Option 1 will be the default option.)

- Option 1: Disclose name and address of account
- Option 2: Anonymous donation

**Please indicate restrictions on the use of designated grant funds, if any. Responsibility to accept and comply with such restrictions rests with the recipient organization.*

SPECIFY AMOUNT OF PROPOSED GRANT

Proposed Grant Amount (Minimum of \$250.00 or balance of the account if less): \$ _____

CERTIFICATION

I hereby certify that if this grant is distributed, it will not fulfill a pre-existing pledge to the recommended charity, and neither I nor any other individual will receive any goods, services or other private benefit from the charitable organization. I understand that this grant nomination will be subject to all the terms and conditions that apply to the account in accordance with my account application.

Donor or Nominator Signature _____ Date _____

The most efficient way to process a grant request is by using the new ACP Portal.
The first step will be to set up a login to the CCM Client Portal (the ACP Portal is accessed through the CCM Client Portal.)
You can do that by going to this link: <https://carlsoncap.com/portal/register/>

GRANT NOMINATION GUIDELINES

The information below provides a brief overview regarding the guidelines for making grant nominations. Please refer to your Program Guide for complete details.

RESTRICTIONS ON GRANTS

Grant recommendations are subject to review and approval by the American Center for Philanthropy. You may recommend grants to U.S. organizations that are tax-exempt public charities¹ or to U.S., state or local governmental organizations qualified to receive tax-deductible charitable contributions, such as state colleges or universities². ACP will not approve recommended grants that: are directed to foreign charitable organizations, fulfill a Donor's pre-existing pledge to a charity; provide private benefit to the Donor or any other individual; support lobbying, political campaigns or other political activities; or are for any other purpose that is not entirely charitable. ACP will take remedial action if it discovers that grants have been made for improper purposes. Remedial actions may include, but are not limited to, a requirement that the recipient charity return the grant.

GRANT NOTIFICATION

Grants are made by ACP directly to the recipient organization, through checks bearing the name of ACP. Donors may not serve as intermediaries in the delivery of grants. Donors will receive written confirmation of all grants distributed from the account. Should ACP decide not to approve a recommended grant, ACP will notify the Donor.

¹ As defined in Internal Revenue Code Section 501(c)(3) and Section 509(a)(1), (2) or (3).

² As defined in Internal Revenue Code Section 170(c)(1).