

**ESTABLISHING A NAMED DONOR-ADVISED FUND
WITH THE
DIOCESE OF JOLIET CATHOLIC EDUCATION FOUNDATION TRUST**

(Date) _____ (Donor Name) _____

Please accept my gift of \$ _____ payable as noted in EXHIBIT A in support of financially-need based scholarships to qualified elementary or secondary grade student applicants as distributed annually by the Catholic Education Foundation ('FOUNDATION');

(check one)

- any diocesan school
- (Name of School, City) _____

I wish for the NAME OF THE FUND TO BE: _____ ('FUND')

(check all that apply)

- I wish to remain anonymous
- You may share my name/name of fund in CEF promotional materials.
- The name of the fund may be shared with the Recipient Student(s) or in CEF promotions.
- I am interested in the identity of the student(s) receiving assistance.
- I am interested in further engagement with the student(s) receiving assistance.

Additional contributions may be made to Fund at any time by the Donor(s) or by others wishing to support the purposes of the Fund via mail, wire transfer or on-line, provided that such contributions are in a form acceptable under the Diocese of Joliet Gift Acceptance Policy

This gift is to be used for the purpose of disbursing financially-need based scholarships to qualified elementary or secondary grade student applicants unless noted differently in the following description: _____

Distributions:

Distributions will be made in accordance with the Scholarship Fund Award Policy established by the Board of Directors of the Foundation unless otherwise noted in the description above;

Gift Acceptance

Individual and corporate donors are invited to donate gifts of cash, stock or other appreciated property to this fund in accordance with the Gift Acceptance Policy of the Diocese of Joliet;

Records.

A list of the scholarship recipient(s) and names of all contributors to the Fund, their donations and the date thereof, and the current value of the Fund, shall be maintained by the Foundation (via *FACTS and Amergent*), and updated regularly. This record is available to the donor upon request.

DONOR(S)

CATHOLIC EDUCATION FOUNDATION

By: _____

By: _____

Print Name:

Print Name:

EXHIBIT A

(Description of Gift)

Check or Cash

\$ _____ (amount)

Stock/Securities

_____ (number of shares of stock)

Description of Stock

Other

(Attach Documentation, if appropriate)