CHARITABLE INTEREST WORKSHEET

OPTIONAL — SEND THIS WITH YOUR APPLICATION OR PREPARE AT YOUR CONVENIENCE

This form will serve as a general recommendation to the American Foundation regarding the charitable objectives of your family foundation. This will be helpful if, for some unforeseen reason, your selected charitable advisor does not submit annual recommendations for charitable grants. If no advisors are selected, the American Foundation will refer to this sheet in making future charitable grants in your name.

Personal involvement in charity and "donor advised" funds is highly encouraged. In fact, we believe the more and longer a donor is involved, the better. Three good things usually happen when individuals, families and business leaders become more involved in the charitable process:

1. more charitable funds are developed;
2. contributors become better people; and more often than not,
3. the charitable activity or program itself will be more effective and successful.

We attribute this phenomenon to a term we call "charitable ownership."

The American Foundation would like to help you create and develop a clear definition of your charitable interests. This form can help you develop an individual or family charitable mission statement.

We welcome, at any time, letters of recommendation regarding any creative arrangement you might design for the ongoing charitable involvement of family members, friends, and heirs.

Please establish a mission statement that your heirs or others can look to for guidance.

1. DETERMINING YOUR CHARITABLE MISSION

Example: Our mission is to build family unity through charitable giving.

_____

_____

_____

_____

Do you have general fields of interest you and your family want to support?

2. GENERAL FIELDS OF INTEREST

Example: Health Research.

_____

_____

_____

_____

Are there specific charities you want to support?

3. DETERMINING YOUR CHARITABLE MISSION

Example: American Lung Association, Mesa, Arizona Chapter.

_____

_____

_____

_____

4. FIXED RECOMMENDATIONS

You have four options for determining how future charitable grants will be handled.
Please initial the box next to the option that best reflects your wishes.

☐ Your selected successor charitable advisor will make all charitable grant recommendations. (If you select this box, you do not need to fill out the following table.)

☐ You designate a fixed portion (dollar amount or percentage) of annual income and/or growth to go to specified charities or charitable fields of interest, with the balance to be distributed by your successor charitable advisor. (Please fill out the table below.)

☐ You designate the total fixed dollar amount or percentage of annual income and/or growth to go to your charitable fields of interest. (Please fill out the table below.)

☐ You designate the total fixed dollar amount or percentage of annual income and/or growth to go to specified charities. (Please fill out the table below.)

SPECIFIC CHARITY OR CHARITABLE FIELD OF INTEREST	DOLLAR AMOUNT OR PERCENTAGE OF INCOME
Additional gift allocation to the American Foundation (over and above the annual 1% described in the Program Description)	

Note: Grant recommendations can be made up to the maximum amount of 100% of the annual income or growth of your family foundation. If the dollar amounts of your grant recommendations exceed 100% of the annual income and growth of your family foundation, the American Foundation will notify you so that adjustments can be made.

5. VOLUNTEER HOURS

Would you consider volunteering some of your time to American Foundation projects? _____ per month

6. DONOR SIGNATURE(S)

Donor 1 Signature	Date
Donor 2 Signature	Date

Please mail to: The American Foundation
4518 North 32nd Street, Phoenix, AZ 85018
Telephone: (602) 955-4770 • Professionals call: (602) 522-8812 • Fax: (602) 955-4707
Web site: americanfoundation.org • E-mail: info:@americanfoundation.org