



For the Foundation to best understand your philanthropic objectives, we ask for the following information:

New Fund Questionnaire

Basic Information - Primary Fund Owner

| | | | |
|------------------|-------------|---------------|-------------|
| First Name: | | Last Name: | |
| Title: | | Organization: | |
| Mailing Address: | | | |
| City: | | State: | Zip: |
| Home Phone: | Work Phone: | | Cell Phone: |
| Email Address: | | | |
| Website Address: | | | |

Basic Information - Secondary Fund Owner

| | | | |
|------------------|-------------|---------------|-------------|
| First Name: | | Last Name: | |
| Title: | | Organization: | |
| Mailing Address: | | | |
| City: | | State: | Zip: |
| Home Phone: | Work Phone: | | Cell Phone: |
| Email Address: | | | |
| Website Address: | | | |

Fund Purpose (please continue answers on reverse side if necessary)

- What is the overall purpose of this fund?

- What is your target date for establishing this fund? For how long will this fund exist?

- What specific measurable outcomes do you hope to achieve by establishing this fund?

- What group or population of citizens will benefit from this fund?

- What geographic community or communities will this fund serve?

- Who will serve as advisors or on the selection committee for this fund?

Funding Plan

- When do you expect to submit the Establishing Gift for this fund? What amount do you anticipate giving and in what form? (check/stock)?

- How much money (gifts) do you anticipate being contributed to this fund in the first 12 months of existence?

- How much money (gifts) do you anticipate being contributed to this fund on a continuing annual basis?

- Do you intend to research and submit funding requests to potential funders? Do you have any requests or applications pending?

- Do you expect to hold fundraising events to generate contributions to this fund? What are they and when do you expect to hold them?

Granting Plan

- When do you anticipate making your first grant or scholarship from this fund, and for what amount?

- If you have a written plan of activity or program description for this fund, please attach it.

- How many grants or scholarships, including amounts, do you anticipate making from this fund on an annual basis?

- Do you anticipate any program expenses or distributions from this fund other than grant or scholarship payments?

Donor Services

- Will you require media support from the Foundation to promote your fundraising? What types of support do you anticipate?

- How frequently will you require a financial statement (fund statement) regarding activity for this fund?

Interview conducted by: _____ **Date:** _____