# Gifts, Distributions & Fund Manager

## HOW TO GIVE TO YOUR FUND

Charitable contributions can be made to the fund in a variety of ways:

- Checks
- Cash
- Wire transfers
- Stock/appreciated securities
- Real estate
- IRA charitable rollover
- Estate planning options

### To contribute via check

- Make check payable to "Community Foundation of the Ozarks" or "CFO"
- Memo line should include the name of the fund you are contributing to
- Mail check to the CFO at: Community Foundation of the Ozarks, P.O. Box 8960, Springfield, MO, 65801

Cash gifts can also be mailed to the CFO with the name of the fund noted. For all other gifts, please contact the CFO for guidance and directions.

## ACCESSING FUND MANAGER

Fund Manager is a web-based service for fund advisors, nonprofit agency partners and affiliate community foundations. With information updated daily, it enables you to view your fund balances, gifts to your funds, and completed and pending grants from your funds. Fund advisors with agency partners can request distributions online at any time. Log on at **cfozarks.org/fundmanager** or through the link on the CFO's website.

> Need access to Fund Manager? Contact **support@cfozarks.org** or 417-864-6199.

## HOW TO REQUEST A DISTRIBUTION

The CFO can make distributions back to your organization at any time. Submit the request online via Fund Manager. Online requests are processed Monday, Wednesday and Friday each week. This schedule is adjusted for holidays and weather. Requests may be taken via email, but this will slow the disbursement process.

- **Email requests:** mschuchmann@cfozarks.org
- **Fax:** 417-864-8344
- **Written request:** Community Foundation of the Ozarks
  Attn: Millie Schuchmann
  P.O. Box 8960 · Springfield, MO 65801

### Guidelines for distributions

- CFO can make direct payment from your fund to a vendor which has invoiced your organization. **To pay a vendor, the CFO must have a clear invoice for the expenses. The items or services purchased must reflect your program's charitable purpose and follow CFO policy.** To have these invoices paid, please submit copies and instructions to your CFO contact through the channels listed above. The CFO cannot process payment requests to individuals. Instead, a disbursement can be made back to your organization to pay the individual.
- CFO can make distributions from your fund to organizations classified by the IRS as 501(c)3 organizations, recognized houses of worship, schools or incorporated government entities.
- When payment of $600 or more per year is made, **a completed W-9 for the recipient is required before the CFO can disburse the payment.** You can find the W-9 form instructions and explanation in Fund Manager under the "Files" tab. A complete W-9 must be submitted prior to payment. Once the form is signed and completed, it can be submitted via Fund Manager or emailed to your CFO contact to begin the disbursement process.
- If you have questions about these guidelines, please ask your CFO contact.