

## DONOR SERVICES

# Gifts, Grants & Fund Manager



### How to make a gift 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 can make grant recommendations online at any time. Log on at [cfozarks.org/fundmanager](http://cfozarks.org/fundmanager) or through the link on the CFO’s website. Need access to Fund Manager? Contact **Caitlin Golike**, Director of Donor Services, at [cgolike@cfozarks.org](mailto:cgolike@cfozarks.org) or (417) 864-6199.

### How to make a grant recommendation

Grant recommendations can easily be made in the following ways:

- **Online:** Log into Fund Manager and make your grant recommendations online. Here you will be able to select the amount, the organization, and the grant’s designation. You even have the ability to schedule a recurring grant to make giving from your fund even easier.
- **By Email:** Email Caitlin Golike Director of Donor Services, at [cgolike@cfozarks.org](mailto:cgolike@cfozarks.org). She will need to know the grant amount, organization receiving the grant, grant designation/purpose (if applicable), and where to mail the grant check.
- **By Mail:** Mail to or drop off your grant recommendations at the CFO Office.

Want to give but don’t have a charity in mind? Ask your contact for suggestions or schedule a meeting to discuss your interests.

### Guidelines for grant recommendations

- All grants must be made to organizations classified by the IRS as 501(c)3 organizations, recognized houses of worship, schools or incorporated government entities.
- Grants may not be used to pay membership dues or pledges.
- Grants may not benefit the donor or donor’s family members in any way.
- If you have questions about these guidelines, please ask your CFO contact.

