



The Erie  
Community  
Foundation

*Helping today... Shaping tomorrow.*

**THE ERIE COMMUNITY FOUNDATION  
NEW FUND CHECKLIST**  
(Please complete and return)

1. **Name of Fund:** \_\_\_\_\_  
(Enter name of your choice)

2. **Fund is:** \_\_\_\_\_ Endowed \_\_\_\_\_ Non-Endowed \_\_\_\_\_ Pass-Through  
(Check one)

3. **Recognition:** \_\_\_\_\_ Charities will know grants are made from your fund and will  
(Check one) be asked to thank you for your generosity.

\_\_\_\_\_ Grants will be anonymous.

4. **Fund Type:**

_____ Unrestricted	_____ Geographic
_____ Donor Advised	_____ Annuities and Trusts
_____ Field of Interest	_____ Supporting Organization
_____ Donor Designated	_____ Scholarship
_____ Agency Endowment	_____ Memorial

Note: Check type that best describes your fund. If questions, please contact ECF staff.

5. **Contact Information:**

\_\_\_\_\_  
**Name(s)**

\_\_\_\_\_  
**Primary Address**

\_\_\_\_\_  
**Phone Number                      Fax Number                      E-mail Address**

\_\_\_\_\_  
**(Secondary Address and Phone; if any)**

6. **Asset:** \_\_\_\_\_ Attached/Enclosed.  
\_\_\_\_\_ Will be transferred. Transfer instructions:

\_\_\_\_\_

\_\_\_\_\_



7. **Legalities:**

I/we understand the fund will be operated in a manner that does not affect the status of ECF as an organization described in Section 501(c) (3) of the Internal Revenue Code of 1986 ("Code"), and as an organization which is not a private foundation within the meaning of Section 509(a) of the Code. This Agreement shall be interpreted in a manner consistent with the foregoing intention and so as to conform to the requirement of the foregoing provisions of the federal tax laws and regulations issued pursuant thereto. The ECF is authorized to amend this Agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. The Foundation shall have variance power as set forth in tax regulations 1.170A-9(e) (11) (V) (B), (C) and (D). References herein to provisions of the Code shall be deemed references to the corresponding provisions of any future Internal Revenue Law.

\_\_\_\_\_

\_\_\_\_\_  
Donor(s) or  
Board Chair (if an agency endowment fund)

\_\_\_\_\_  
Date

Accepted this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_. Receipt of the above described property and establishment of the above described fund is acknowledged.

THE ERIE COMMUNITY FOUNDATION

By \_\_\_\_\_  
Michael L. Batchelor  
President

Witness

\_\_\_\_\_  
Kevin E. Moore  
Vice President

Complete this form and return it to:

**The Erie Community Foundation, 459 West Sixth Street, Erie PA 16507**

Or call 814-454-0843 to arrange a meeting

[www.eriecommunityfoundation.org](http://www.eriecommunityfoundation.org)

[kmoore@eriecommunityfoundation.org](mailto:kmoore@eriecommunityfoundation.org)