

Donor Advised Funds

Recommend a Grant from Your Donor Advised Fund to benefit Boys & Girls Clubs of Greater Milwaukee! While the Boys & Girls Clubs of Greater Milwaukee (“BGCGM”) does not sponsor a donor advised fund (“DAF”), it is a qualified nonprofit to receive grants from DAFs. Recommending your DAF provider make a grant to BGCGM for the benefit of your preferred designation at the Boys & Girls Clubs!

How it Works

Recommending your grant is an easy three-step process.

1. Sign into Your DAF Account and Locate Your DAF Provider’s Grant-Recommendation Form

Most grant recommendation forms are housed behind a password-protected area of a DAF provider’s website. There you’ll likely have the option to print a grant recommendation form or complete a similar online form. (The latter is particularly useful for more time-sensitive grant recommendations.)

2. Complete Key Information in Your Form

- Your DAF grant should be directed to:
Boys & Girls Clubs of Greater Milwaukee
1558 N. 6th Street
Milwaukee, WI 53212
Federal Tax ID: 39-0806292
Contact Name: Laura Mullen (Laura.Mullen@bgcmilwaukee.org)
- Note your grant’s intended purpose on your form, including, if applicable, the benefitting fund name. (A grant’s purpose is normally noted in its own section that is sometimes listed as “Grant Details,” “Grant Purpose” or “Recommended Purpose.”)
- Mark whether you would like your grant’s donor to be listed as the name of the DAF account’s owner(s) or the name of the DAF account itself. (This is important so BGCGM can identify, credit, and acknowledge your gift appropriately.)

3. Submit Your Completed Recommendation Form

Either mail your printed form to your DAF provider or hit “send”/“submit” on your completed online form.

Other Important Notes

- The IRS prohibits DAFs from making distributions that provide “more than incidental benefit” to a donor, like distributions toward a pre-existing pledge with BGCGM or distributions that give increased athletics status (including improved seating).
- You cannot mix DAFs with the IRA Charitable Rollover – you must direct your IRA Charitable Rollover gift directly to a qualified charity (like BGCGM), not a DAF, to receive the Rollover’s benefits.
- You can designate – via your DAF’s beneficiary form – BGCGM for the benefit of the Clubs as the beneficiary of your remaining DAF funds following your passing. We can provide you with the appropriate beneficiary designation language if you’d like to create this kind of gift.

Boys & Girls Clubs of Greater Milwaukee advises all supporters to consult with their financial, legal, and tax advisers during their philanthropic planning. Once you’ve had these discussions, please reach out to Laura Mullen at Laura.Mullen@bgcmilwaukee.org with any further questions.

**The Boys & Girls Clubs of Greater Milwaukee does not provide tax, legal or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal, or accounting advice. You should consult your own tax, legal, and accounting advisors before engaging in any transaction.*