

- Draft Agreement
- Mailed Agreement
- Received Signed Agreement
- Board Approval
- Copies (2) of Executed Agreement Mailed
- FundWeb Info Emailed



424 East Kennedy Street | Spartanburg, SC 29302
864.582.0138 | www.spcf.org

New Fundholder Information Form

(To be completed by SCF Staff upon creation of a new fund with the Foundation)

Fund Name _____	
Fund # _____	
Fund Type <input type="checkbox"/> Annuity <input type="checkbox"/> Charitable Lead Trust <input type="checkbox"/> Donor Advised <input type="checkbox"/> Field of Interest <input type="checkbox"/> Scholarship <input type="checkbox"/> Agency <input type="checkbox"/> Charitable Remainder Trust <input type="checkbox"/> Designated <input type="checkbox"/> Special <input type="checkbox"/> Supporting Organization	
Fund Class <input type="checkbox"/> Endowed <input type="checkbox"/> Non-endowed Investment Type <input type="checkbox"/> Growth (1110) <input type="checkbox"/> Moderate (1100) <input type="checkbox"/> Money Market (1105)	
Donor requests anonymity with regard to (check all that apply): <input type="checkbox"/> Fund listing in publications <input type="checkbox"/> Grantmaking	
Donor desires to support the community's broader charitable needs through The Spartanburg County Foundation's Community Fund. The donor recommends that _____% (or \$ _____) be used annually for grants recommended by The Spartanburg County Foundation's Board of Trustees.	

Donor Name(s) _____

Address _____

City _____

State _____

Zip _____

Home Phone _____

Mobile Phone _____

E-mail address _____

Preferred method of correspondence: Home Phone Mobile Phone Email

Referred to SCF by: _____

Awards Committee/Positions: _____

Charitable Interests: Arts & Culture Environment & Historic Preservation Recreation & Youth
 Education Health & Human Services

Donor(s) are interested in:

- Attending education sessions
- Receiving information about planned giving and related events/workshops
- Serving on a panel or committee
- Being profiled / photographed in SCF publications
- Receiving correspondence from SCF

**SCF STAFF MEMBER
COMPLETING FORM**