

DONATE A PRIVATELY HELD BUSINESS INTEREST

To make a donation of a privately held business interest to an existing donor-advised fund at Greater Horizons, please complete the following form, and note that all information collected will remain confidential. All personal data on this form is subject to Greater Horizons' privacy policy, which can be found at www.greaterhorizons.org/privacy-policy.

To establish a new donor-advised fund to receive the donation, please also complete a separate Donor-Advised Fund Agreement, available at www.greaterhorizons.org.

1 Donor-Advised Fund

Name of Fund

Fund ID

2 Donor Information

List additional donors in section 5.

Mr. Mrs. Ms. Dr. _____

First Name

Middle Initial

Last Name

Suffix

Preferred Name or Nickname

Date of Birth

Address Home Work

Phone Home Work Cell

City

State

Zip Code

Email Address

3 Professional Advisor Information

Please list any professional advisors (accountants, attorneys, financial advisors) Greater Horizons should include in follow-up conversations regarding the gift described in section 4. List additional advisors in section 5.

Professional Advisor Name & Profession

Firm Name

Address

Phone

City

State

Zip Code

Email Address



4

Gift Details

Please provide the following information about the potential gift. Include any additional information in section 5.

Business Legal Name

Full Legal Name of the Owner of the Business Interest to be Donated

Describe the nature of the business and its underlying assets:

[Empty text box for describing the business and its underlying assets]

Business formed as:

*The LLC is taxed as a:

- C Corporation
- S Corporation
- Limited Partnership
- Limited Liability Company (LLC)*
- Other**: _____

- Partnership
- C Corporation
- S Corporation
- Not Separately Taxed - Single Member LLC

**Greater Horizons does not accept donations of general partnership interests.

CFO or CPA for the Business

Phone

Email Address

Is there a deadline for completing the gift?
 No Yes: _____

Is there a binding obligation to sell the interest?
 No Yes: _____

Are there any potential buyers?
 No Yes: _____

Are there any capital or expense calls?
 No Yes: _____

4

Gift Details Continued

What percentage interest in the business does the donor wish to donate? _____

What is the estimated value of the donor's interest to be donated? _____

How was this value determined? _____

What is the donor's cost basis? _____

How long has the donor owned the asset? _____

How did the donor acquire the asset? _____

Are there currently any mortgages or other obligations attached to the asset? If yes, provide the amount and age of the debt.

No Yes: _____

Are there any "hot assets" (such as inventory or receivables) that will be part of an eventual sale of the business?

No Yes: _____

5

Additional Information

Please provide any additional information you would like us to know.

6

Required Documents

Please submit the following documents that coincide with the type of business.

Corporation (C or S Corporation)

- ▶ Articles of Incorporation
- ▶ Bylaws
- ▶ List of Shareholders and Number of Shares Owned by Each
- ▶ Appraisal (if available*)
- ▶ Shareholder and/or Buy-Sell Agreement
- ▶ Most Recent Corporate Financial Statement
- ▶ Most Recent Federal Tax Return (Form 1120S and K-1 for S-Corps; Form 1120 for C-Corps)

Limited Partnership

- ▶ Certificate of LP Formation
- ▶ Partnership Agreement
- ▶ List of Partners and Percentage Owned by Each
- ▶ Appraisal (if available*)
- ▶ Most Recent Financial Statement
- ▶ Most Recent Federal Tax Return (Form 1065 and K-1)

Limited Liability Company

- ▶ Articles of Organization
- ▶ Operating Agreement
- ▶ List of Members and Percentage Owned by Each
- ▶ Appraisal (if available*)
- ▶ Most Recent Financial Statement
- ▶ Most Recent Federal Tax Return (Form 1065 and K-1)

**A qualified appraisal is required by the IRS and must be submitted to Greater Horizons before Jan. 31 of the year following the gift. If the donor does not have an appraiser, Greater Horizons can provide recommendations.*

7

Next Steps

Please return this form and the documents listed in section 6 to corporatcounsel@greaterhorizons.org. A representative from Greater Horizons will contact the donor and any named advisors listed in sections 3 and 5 to discuss this gift. Assuming Greater Horizons can accept this gift, the donor will need to sign a gift agreement provided by Greater Horizons.

Questions? Contact us at info@greaterhorizons.org or 866.627.3440.