



Endowment/Scholarship Fund Usage Report

The Catholic Community Foundation of Southwest Florida is committed to honoring the wishes of all donors. This includes ensuring that distributions/grants from endowment and scholarship funds are utilized by the beneficiary (School, Parish, Program, etc.) according to any and all restrictions set forth by the donor in the associated Fund Agreement. As part of the process, each beneficiary must submit a written annual report to the Catholic Community Foundation detailing how the previous year's distribution/grant was utilized. **This report must be received by the Catholic Community Foundation prior to the release of distributions/grants.**

Please complete this form for each endowment and/or scholarship fund from which you received a distribution/grant and email to CCF@dioceseofvenice.org. You can access information regarding your distribution/grant as well as a copy of any associated fund agreement(s) by logging into your client portal at www.ccfdioceseofvenice.org.

Beneficiary Name: _____

Endowment/Scholarship Fund Name: _____ Fund #: _____

Purpose of Endowment/Scholarship Fund: _____

Distribution/Grant Amount: _____ Distribution/Grant Date: _____

*How was this Distribution/Grant Utilized and the Associated Impact on Your Organization: _____

**Attach any associated back-up materials related to how the distribution/grant was utilized (i.e., list of students receiving tuition assistance, program expense funded, etc.)*

By signing below, you affirm that all funds received from the Catholic Community Foundation of Southwest Florida, Inc. were utilized in the manner stated above.

Pastor/Administrator/Principal _____ Date _____

Business Manager/Bookkeeper _____ Date _____

For any questions, please call 941-441-1124

Please email completed form(s) and materials to CCF@dioceseofvenice.org