

Project Description: _____			
Donor / Advisor _____		Estimated AUI _____	
Related to OCF DAF	<input type="checkbox"/> No <input type="checkbox"/> Yes	Fund Name _____	
Size of Fund _____	Fund Type: <input type="checkbox"/> Perm. <input type="checkbox"/> Wholly Exp.		

Project Summary:

Does this work directly benefit the donor/advisor? ☐ No ☐ Yes

Relationship Manager

Explanation:

Deliverables	Timeline	OCF Staff Involved
1		
2		
3		
4		
5		

Hour Estimates

Executive
Officer
Associate

Total

Pricing Recommendation:

\$

Explanation:

Risk Assessment

- ☐ Low
☐ Medium
☐ High

Explanation of Risks:**Additional Comments:****Recommendation:**

- ☐ Approve
☐ Reject

Decision

- ☐ OCF will pursue this project (included in services)
☐ OCF will pursue this project (client to be invoiced)
☐ OCF will decline this project

Reason: _____

Decision Comments: