

# UNIBANK

## Charitable Giving Request Guidelines

UniBank is committed to providing support to the communities we serve. We encourage and accept applications for funding that fall within our geographical footprint and fall within the categories of:

- Youth Development
- Community Development
- Affordable Housing
- Environmental Concerns

***At UniBank, we look to fund organizations that demonstrate:***

- Programming that will strengthen the communities we serve
- Proven success in organizational activities
- Sound administration and finances
- Effective collaboration with other organizations
- Tax –exempt 501(c)(3) status

Further consideration will be given to organizations with a relationship to UniBank and organizations that our employees actively participate in volunteering.

UniBank does ***not*** fund the following:

- Operational expenses
- Capital campaigns
- Travel expenses
- Individuals
- Fundraising walks or runs
- Private foundations (as described in Section 509(a) of the IRS code)

### ***How to Apply***

Applications must be submitted in writing. (Application on page 3)

- Please fill out the Charitable Giving application.

- Include a cover letter on the requesting organization's letterhead clearly stating the amount of the request and the way the funds will be used and a brief summary of how the funds will be used.
- Provide a contact person and telephone number.
- A brief description of the organization's mission, history and accomplishments.
- A letter of tax-exempt charitable status under Section 501(c)(3) of the IRS code.
- A list of the current Board of Directors.
- A brief report on accomplishments from the last funding received from UniBank (if applicable).
- A plan for measuring the impact of UniBank's contribution or outcome of funding/sponsorship efforts.

***Please have available upon request:***

- The organization's operating budget for the current year and its proposed budget for the next year, or the project's operating budget for the current year and its proposed budget, upon request.
- The most recent audited financial statements and the most recent Form 990 (the combined federal and state charitable report) upon request.
- Information on additional fundraising efforts.

***Application information and deadlines***

All applications must be submitted in writing.

UniBank meets on a monthly basis to review applications during the months of September through June. Requests for funding will automatically be put into consideration for the next available meeting.

Please submit applications at least two months prior to need for funds to ensure a timely decision. Notification of the decision will be provided in writing.

# UNIBANK

## Charitable Contribution Request Form

PLEASE FILL OUT THIS APPLICATION FORM COMPLETELY

Date: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Executive Director: \_\_\_\_\_

Does United Way fund your organization?  Yes  No

Are you a customer of UniBank?  Yes  No

Do any UniBank employees volunteer for your organization?  Yes  No

If yes, please list: \_\_\_\_\_

\_\_\_\_\_

Please provide a brief description of your organization's history:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Geographic area served: \_\_\_\_\_

Age of population served (youth, seniors, etc.): \_\_\_\_\_

Percentage of the population served that is considered low income: \_\_\_\_\_ %

Number of people served annually: \_\_\_\_\_

Amount of funds requested: \$ \_\_\_\_\_ Total fundraising goal: \$ \_\_\_\_\_

Check Payee: \_\_\_\_\_

Address for delivery if different from above: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Briefly summarize the program for which you are requesting funds:

---

---

---

---

---

---

---

---

Date(s) of event/program (if applicable): \_\_\_\_\_

Briefly explain how your project/program is relevant to the UniBank's funding priorities:

---

---

---

---

---

---

---

---

Please send all requests to:

**UniBank Community Relations Department**

49 Church Street  
Whitinsville, MA 01588

Or email to: [contributions@unibank.com](mailto:contributions@unibank.com)