



# BANK OF MONTANA

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MONTANA'S BUSINESS BANK

## DONATION REQUEST FORM

**Before submitting your application, please be sure that you have reviewed the *Guidelines for Applicants* to make certain that your application is in compliance with all guidelines.**

**Please note:** If required materials are not included, your application will not be considered for funding.

**Required materials:**

- Fully completed application form.
- Verification of Charitable Status, 501 (C)(3) letter from IRS

**Optional:**

- Recommendation letters.
- Copies of your project or organization's promotional materials.
- Project/event proposal and organizational background. Maximum one additional page.

**Please **mail** your completed application packet including accompanying materials to:**

Attn: Charitable Giving  
Bank of Montana  
125 Bank Street, Suite 100  
Missoula, MT 59802  
(406) 829-2662  
E-mail: [dcarlson@bankofmontana.com](mailto:dcarlson@bankofmontana.com)



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### GUIDELINES FOR APPLICANTS

Bank of Montana aligns our giving with our team members philanthropic passions, i.e. giving to an organization will have greater impact if one of our team members is on the Board of the organization, volunteers their time with the organization, etc. Bank of Montana primarily donates to organizations with a tax exempt status from federal income tax under Section 501 (c) (3) of the Internal Revenue Code, qualifies as a publicly supported organization as described in Section 509 (a) of the Code, or can present evidence that the applicant is a legally established unit of government.

**Bank of Montana funding priorities are focused on programs that provide a direct impact to our community.**

Bank of Montana provides donations in two main areas: Community Development and Leadership Opportunities.

**Community Development Funds** are awarded to nonprofit organizations that provide services to low-and moderate-income (LMI) individuals and communities across our territory. Bank of Montana's CRA committee works together with those nonprofits toward the salient goal of community development. We provide expertise and resources to affordable housing projects, services targeted to LMI individuals, activities that revitalize or stabilize LMI geographies, and activities that promote economic development.

**Leadership Opportunities** give Bank of Montana employees the opportunity to be community stewards. Bank of Montana relies on staff leadership to recommend funding based on the needs of their communities. From there, Bank of Montana donates to community projects and activities. Leadership Funding Opportunities are evaluated based on the nonprofits' organizational background, community benefit and support, and the strength of the nonprofits' leadership and financial stability.

Unsolicited applications will be referred to Bank of Montana CEO and/or Vice President. Requests are reviewed continually.

**Bank of Montana does not typically fund:**

- Individuals.
- Projects that do not have a significant impact within communities Bank of Montana serves.
- Projects designed to influence legislation or elect candidates to public office.
- Projects of sectarian or religious organizations whose services are limited to members of any one religious group.
- Projects which clearly represent a duplication of effort.
- Day-to-day operating expenses for any public or private educational institution (this does not preclude requests for special events or needs from such institutions).
- Any project that in any manner implies restriction of services based on any protected class.
- Endowments.
- Indirect operating expenses, deficit reduction, or general administrative overhead expenses. Unrelated salary expenses will not be considered.
- Support for business enterprise.
- Construction costs for new buildings or remodeling proposals.

**Please do not include the above items in your funding request. If you have a question about specific items to be considered for funding, please contact us by phone or email.**

**Organizations can only be approved for and receive funding one time per year.**



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## APPLICATION

Date of Application \_\_\_\_\_ Tax ID # \_\_\_\_\_

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

Contact Person and Title: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone/Fax/E-mail: \_\_\_\_\_

Project/Program Title: \_\_\_\_\_

Amount Requested: \_\_\_\_\_ Date Funding Needed: \_\_\_\_\_

Total Project/Program Budget: \_\_\_\_\_ How many individuals will benefit/participate: \_\_\_\_\_

Organization Mission and Brief Summary of Proposed Activity: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List the states and counties reached by this program: \_\_\_\_\_

Has BOM funded your organization before?: Yes  No  If yes, please fill out the below information.

Does your organization provide service to an underserved population? Explain: \_\_\_\_\_

\_\_\_\_\_

Does your organization provide assistance or loans to small businesses? Explain: \_\_\_\_\_

\_\_\_\_\_

Are any BOM employees / directors associated with your organization? Explain: \_\_\_\_\_

\_\_\_\_\_

Is your organization a Bank of Montana customer? Explain: \_\_\_\_\_

\_\_\_\_\_

### FUNDING HISTORY WITH THE BANK OF MONTANA (If your organization has received prior funding, you must fill out this section.)

List all date(s) and donation amount(s) your organization has received from Bank of Montana

Date: \_\_\_\_\_ Amount: \_\_\_\_\_ Program: \_\_\_\_\_

Date: \_\_\_\_\_ Amount: \_\_\_\_\_ Program: \_\_\_\_\_

Date: \_\_\_\_\_ Amount: \_\_\_\_\_ Program: \_\_\_\_\_

\_\_\_\_\_  
Signature and Title

\_\_\_\_\_  
Date