



BANK OF MONTANA[®]
Y O U R B U S I N E S S B A N K

DONATION REQUEST FORM

Before submitting your application, please be sure that you have reviewed the *Guidelines for Applicants* to make certain that your application follows 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 or e-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: equade@bankofmontana.com

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's COO. Requests are reviewed at least annually.

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.

If you request a meeting along with or in lieu of this donation request and do not declare the purpose of the meeting; to garner a donation, sell something, etc., you will be immediately disqualified from any eligibility for any donation or from any sale when it is subsequently discovered.

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



BANK OF MONTANA[®]

YOUR BUSINESS BANK

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? If not, would your organization transfer its banking relationship to BOM?: _____

Do you already have debt financing for this project/initiative/non-profit committed and/or in place? If so, with who and under what terms? Would you consider refinancing that debt with BOM?: _____

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