

CHARITABLE DONATION REQUEST FORM

All of the following information is required in order for Community Resource Federal Credit Union to consider your request.

Organization: _____ Date: _____

Organization's Contact Person: _____ Title: _____

Mailing Address: _____ City: _____ State: _____ ZIP: _____

Phone Number: _____ Email Address: _____

Please make sure your proposal includes the following information:

- A description of your organization, including its mission and major accomplishments
- A copy of the letter from the IRS stating your organization's 501(c)(3) status, if applicable.
- A list of key staff and titles and current Board of Directors including officer status, if applicable

Contact person's relationship to the organization:

Employee _____ Volunteer _____ Paid Worker _____ Fund Raiser _____

What services are rendered by your organization? _____

What percentage of the donation will be used to help low to moderate income individuals or families? _____

How will this donation be used? _____

What kind of advertising/signage and recognition will CRFCU receive, if any? _____

Are there any other financial institutions donating at this time? If so, please list. _____

Why type of contribution are you seeking? (check one)	
_____	Monetary \$ _____ (please be specific)
_____	CRFCU Promotional Item(s) or Raffle Basket
	Desired Items: _____

By what date do you need the contribution? _____

Please submit complete proposals no less than 60 days before contribution is needed. Incomplete or late proposals may not be considered.

Does your organization do business with CRFCU? _____

To whom should the check be made payable? _____

Signature of Organization's Officer: _____

Within 60 days following the event, please provide a letter or program showing how funds were used and the benefits the credit union received.

Internal Use Only

Req. Number: _____	Date of Review: _____	Approved: _____	Denied: _____
Conditions:			

CHARITABLE DONATIONS POLICY

Community Resource Federal Credit Union is committed to supporting causes that improve the quality of life for the residents of the Capital District. The credit union frequently makes donations of cash, goods, or services to local schools, civic groups, and church groups in the communities it serves.

All parties requesting financial support from the credit union must complete a Charitable Donation Request form. The completed form should fully explain the nature of the contribution being sought and include all requested documentation. The Charitable Donation Request form is available in credit union branch offices and on the credit union's website; all required documentation should be submitted to the credit union following the directions provided below.

Contributions Policy

- The organization must also be a 501(c)(3) or non-profit organization.
- Requests should be submitted at least 60 days prior to the event to give proper time to evaluate the request.
- Complete proposals include a description of the organization, its mission and major accomplishments, and a list of current board members and key staff.
- Nonprofit organizations should submit their tax-exempt letters from the Internal Revenue Service with their contribution requests.
- Complete proposals will be considered monthly by the Charitable Donations Committee.
- Incomplete proposals or those with deadlines within 60 days of submission may not be considered.

Preferential consideration is generally given to requests where the following apply:

- The recipient is a local community organization in Albany, Rensselaer, Saratoga and Schenectady counties.
- Money donated will be spent in the Capital Region.
- Money donated will directly benefit the residents of the Capital Region.
- Money donated will benefit a significant group of people (as opposed to a single person).
- The credit union receives recognition for its donations.

The credit union does not make charitable donations to for-profit organizations. For-profit organizations seeking sponsorship may submit requests which will be evaluated by the credit union on a commercial basis for the advertising and marketing benefit such sponsorships would provide to the credit union.

In order to accommodate contribution requests, the credit union may choose to donate promotional items that could be used by the requesting party.

Completed Charitable Donation Request applications and supporting documentation may be submitted by mail, fax or email:

Community Resource Federal Credit Union
Attn: Charitable Donations Committee
20 Wade Road
Latham, NY 12110

Fax: (518) 783-2211

Please direct questions regarding CRFCU's Charitable Donations Policy to Christine Somers at (518) 783-2211 ext.222 or email csomers@communityresourcefcu.com.

