

WESTBURY BANK CHARITABLE FOUNDATION

200 South Main Street, West Bend, WI 53095

Phone (262) 334-5563

The mission of Westbury Bank Charitable Foundation (the "Foundation") is to provide financial support to charitable and community service organizations in the communities in which Westbury Bank (the "Bank") operates. The Foundation is dedicated completely to community activities and the promotion of charitable causes.

The Foundation has identified five areas that it will emphasize in supporting:

- ❖ **Affordable Housing**-- Programs that provide affordable or low income housing and supports the Bank's community reinvestment initiatives.
- ❖ **Education**-- Initiatives at schools that raise the aspirations of students, enhance their knowledge and support the education process.
- ❖ **Health and Human Services**-- Programs essential to underlying medical care, as well as initiatives that focus on physical and mental wellness.
- ❖ **Youth Programs**-- Programs that assist in improving the quality of life for children.
- ❖ **General Community Improvement** – Programs and projects that improve the community assets and organizations in the Bank's core market areas.

REQUIREMENTS FOR APPLICATION

- Grants from the Foundation are generally awarded semi-annually. Applications are accepted year round.
- Awards are generally limited to use in the communities served by the Bank.
- Grant recipients must demonstrate Section 501(c)(3) or 501(c)(1) status and relevance to the Foundation's areas of giving.
- The Foundation does not provide financial support for political organizations or candidates, activities for religious purposes, or contributions to individual endeavors.

When applying for grants from the Foundation, the following information must be included:

- ❖ Organizational Summary (Mission, Goals, Objectives)
- ❖ Specific purpose of funds requested
- ❖ Need for the project / service in the community
- ❖ Amount requested and overall project budget (when applicable)
- ❖ Most recent audit report or financial statements
- ❖ How the success of the use of funds will be evaluated / measured
- ❖ Status of grant activity from other organizations including approvals, denials and pending applications
- ❖ Information on the organization's Executive Director and Board of Directors
- ❖ Copy of the IRS federal tax-exempt letter

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GRANT APPLICATION

Date of Application _____

Grant Applicant's Organization Name _____

Address _____

ORGANIZATION REPRESENTATIVES:

Executive Director _____ Telephone _____
Email _____

Contact Person _____ Telephone _____
Email _____

TYPE AND AMOUNT OF REQUEST:

Amount Requested _____ Total Project Budget _____

Area of Support: (Circle Category)

- Affordable Housing
- Education
- Health and Human Services
- Youth Programs
- General Community
- Other _____ Please explain

Description or purpose that grant would fulfill:

Market area and income segment served by the grant:

PLEASE INCLUDE THE FOLLOWING INFORMATION WITH YOUR GRANT APPLICATION:

1. A copy of the IRS Tax Exempt Status under 501(c)(3) or 501(c)(1) of the Internal Revenue Code.
2. The most recent year-end financial statements for the organization.
3. A written request including the following information:

GENERAL

- Date the organization's Board approved the project and amount of money requested.
- Describe the organization, its purpose and governing structure (explain if other organizations are involved with this project).

PROPOSED PROGRAM OR PROJECT

- Describe the program or project that requires funding by answering the following:
 - Why is the funding needed?
 - Who will be served and how will they benefit?
 - How will the community benefit?
- Describe the steps to implement this project including person responsible for the project and projected timeframe for implementation.
- Describe how the success of the project will be measured and evaluated.

BUDGET INFORMATION

- Itemize the expenses to be funded by this request.
- Indicate the entire budget including amount requested.
- Source of cost estimates / funding need – bids solicited or comparison prices (if applicable).
- Other sources of funding for this project.
- Financing method to sustain this program / project (if applicable).

Please send completed Grant Application and other required information to the address above.