



WELLESLEY BANK CHARITABLE FOUNDATION
Grant Application

General Information
Organization Name
Physical Address
City, State, and ZIP
Mailing Address
City, State, and ZIP
EIN
Business Number
Fax Number
Website Address
Contact Person Name and Title
Date of Request
Requested Contribution
Describe Your Organization
Briefly describe who/what your organization serves. Also, describe the geographic area(s) served by your organizations.
Organization History
Describe the current programs offered by your organization as well as any significant accomplishments. Tell us when your organization was established.
Intended Use of Charitable Contribution
Describe what the contributions will be used for and the expected results.
Affiliations with Wellesley Bank
Describe your affiliation with Wellesley Bank.
Documentation

Please submit the following information with your request form:

1. Copy of the requesting organization's Section 501(c) (3) nonprofit status exemption letter from the Internal Revenue Service.
2. A complete copy of the organization's most current Form 990 and audited financial report.
3. List of the organization's Board of Directors and their affiliations.

I certify that the information supplied on this application is true to the best of my knowledge.

Signed	Date
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Please forward this form or direct any questions to:

Maureen Sullivan

Wellesley Bank Charitable Foundation

40 Central Street, Wellesley, MA 02482

Phone: (781)489-4531

Email: msullivan@wellesleybank.com

WELLESLEY BANK CHARITABLE FOUNDATION

Grant Application Instructions

Wellesley Bank (the "Bank") has a rich history of community involvement in Wellesley, and the greater Boston area. This commitment was strengthened with the establishment of the Wellesley Bank Charitable Foundation (the "Foundation").

We are providing these guidelines to assist you as you prepare your grant request to the Foundation.

Specific Request

When preparing your request, consider including the following information:

- A concise (1-2 pages) letter on your organization's letterhead describing how the funds will be used and an explanation of your organization's mission. Mention facts that will help us determine your geographic reach, number of clients served, programs in place, etc.
- For large grant requests (i.e., \$2,500 or more) please include information on the population that your organization serves, including geographic location, socioeconomic status, demographics and how this population will benefit from the project or grant.

Attachments

Proposals should include the following items if the request amount is for \$2,500 or more:

- Copy of the requesting organization's Section 501(c)(3) nonprofit status exemption letter from the Internal Revenue Service.
- A complete copy of the organization's most current Form 990 and audited financial report.
- List of the organization's Board of Directors and their affiliations.

Restrictions

- The Foundation will fund only 501(c)(3) organizations and those with "public charity" status or its equivalent.
- There will be no funding to political or fraternal organizations or individuals.
- Organizations will not be considered automatically for funding the following year. Proposals with updated attachments will need to be submitted.
- In some cases, site visits will be scheduled before funding decisions are made.
- The Foundation reserves the right to specify use of grant funds and it may require periodic written reports to be submitted concerning use of grant funds.
- The Foundation can request a final written report and accounting of how grant funds were used. If the Foundation believes grant funds were misused, it reserves the right to withhold and/or recover grant funds.
- The Foundation's primary target areas are the communities in which Wellesley Bank serves. We are particularly interested in communities with diverse needs as well as areas where Wellesley Bank is an integral part of the neighboring business community.
- We are interested in supporting organizations that provide community development service such as job training and programs that assist the economically disadvantaged. We believe that education of our youth is our future and special emphasis will be given to educational efforts. Programs providing continued good health care and supportive human service programs are also a priority. We also will support local cultural groups and institutions knowing these grants will broaden access to cultural and art activities and will enhance our quality of life in the communities in which Wellesley Bank operates.

We hope these instructions are useful. All proposals should be mailed to:
Maureen Sullivan
Wellesley Bank Charitable Foundation
40 Central Street
Wellesley, Massachusetts 02482

Thank you and we look forward to developing a partnership with your organization.